Connecticut Immunization Registry and Tracking System

Release 1.1

CIRTS User Manual

September 2012

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Introduction

Welcome

Welcome to the Connecticut Immunization Registry and Tracking System (CIRTS).

Purpose

The goal of this manual is to provide you with a thorough understanding of the Connecticut Immunization Registry and Tracking System (CIRTS).

Upon successful completion of this training, you will be given a User ID and Password with authorization to use CIRTS.

Objectives

Upon completion of this manual, you will be able to:

- ❑ Log in and out of the CIRTS application
- ❑ Navigate through the CIRTS application
- ❑ Create, find, and modify immunization records
- ❑ Find and modify facility records
- ❑ Enter data in CIRTS Question Packages
- ❑ Work with CIRTS system tasks and concerns
- ❑ View and print CIRTS reports
- ❑ Print Immunization Certificates
- ❑ Follow links to DPH and CDC resources such as immunization schedules, immunization practice recommendations, and vaccine information statements

A G E N D A

Overview

The agenda for this guide is as follows:

Chapter	Purpose
Chapter 1: CIRTS System Overview	• Explain the basic structure, purpose and benefits of the Maven Connecticut Immunization Registry and Tracking System (CIRTS) • Demonstrate the ability to Log In and Out of CIRTS using the Single Sign-On (SSO) screen
Chapter 2: CIRTS System Environment	• Identify the main parts of the CIRTS Splash screen and Dashboard and specify the purpose of each
Chapter 3: Immunization Certificates, Forecast, and Summary	• Demonstrate how to view and print an Official Immunization Certificate, Immunization Summary, and Immunization Forecast
Chapter 4: Searching	• Demonstrate how to search for Immunization and Facility records based on specified selection criteria
Chapter 5: Immunization Record Creation and Management	• Demonstrate the ability to create and modify records • Explain deduplication
Chapter 6: Concerns	• Explain how to view and update information for system-generated concerns • Explain how to enter user-generated concerns
Chapter 7: Question Packages – General Operating Procedures	• Explain the general operating procedures for CIRTS Pre-Defined Question Packages
Chapter 8: Medical Home Question Package	• Explain how to use and enter information in the Medical Home Question Package
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Chapter 11: Clinical Comments Question Package	• Explain how to use and enter information in the Clinical Comments Question Package
Chapter 12: Immunization Detailed History Question Package	• Explain how to use and enter information in the Immunization Detailed History Question Package
Chapter 13: Immunization Administration – Current Provider Question Package	• Explain how to use and enter information in the Immunization Administration – Current Provider Question Package
Chapter 14: Immunization Administration – Historical Provider Question Package	• Explain how to use and enter information in the Immunization Administration – Historical Provider Question Package
Chapter 15: Insurance Question Package	• Explain how to use and enter information in the Insurance Question Package

Chapter 16: Electronic Birth Certificate Download Question Package	• Explain how to use and enter information in the Electronic Birth Certificate Download Question Package
Chapter 17: Tasks	• Explain how to create, review and complete tasks
Chapter 18: Reports	• Explain how to view, print, and export CIRTS reports

Chapter 1: Maven Connecticut Immunization Registry and Tracking System Overview

OVERVIEW

Purpose

Explain the basic structure, purpose and benefits of the CIRTS system and demonstrate how to log into the CIRTS system.

Objectives

- User Groups and Permissions

- Log into CIRTS

- Log out of CIRTS

- Understand how system passwords work

CONNECTICUT IMMUNIZATION REGISTRY AND TRACKING SYSTEM (CIRTS) OVERVIEW

The Connecticut Immunization Registry and Tracking System (CIRTS) is an electronic immunization tracking system that allows public health officials and medical providers to receive, manage, process, and analyze immunization-related data. Data from CIRTS can be extracted for the purposes of monitoring, reporting, and performing trend analysis.

CIRTS is based on Consilience Software Inc.'s Maven - a commercial-off-the-shelf (COTS), web-based business rules engine that has been modified for the Connecticut Department of Public Health. It provides interactive, automated information gathering and decision support processes for each record and is compatible with state and national IT standards. It also complies with the Centers for Disease Control and Prevention (CDC) Public Health Information Network (PHIN) published standards and National Vaccine Advisory Committee (NVAC) functional standards.

CIRTS allows secure communication and coordination between the Department of Public Health and medical providers. CIRTS is a secure environment that only displays the data someone needs and is authorized to see. CIRTS can:

- provide a reliable immunization history for any child, whether a new or continuing patient

- consolidate immunizations from all providers into one record

- determine immunizations due or overdue

- provide reminders and recalls for immunizations due or overdue

- generate official immunization records needed for school and day care entry

- generate immunization coverage reports

- provide current recommendations and information on new vaccines

- facilitate introduction of new vaccines or changes in the immunization schedule

- import and export immunization data electronically

CIRTS is HIPAA compliant.

The Maven software application has been designed and modified for use by several DPH areas. Although extensive modifications have been made to adapt it to meet CIRTS needs, you might still see some functionality that will not be used by CIRTS at this time.

USER GROUPS AND PERMISSIONS

Information entered into CIRTS is very sensitive, health-related material. System security is in accordance with established HIPAA standards. Users will be assigned a username and password that will provide access to the system. Each username is connected to one or more roles and one or more groups, which give access to specific system features. The roles and groups to which a user is assigned depend on their job function. Permissions, roles, and groups are described in detail below.

- **Permission**: Permissions in the CIRTS provide the ability within the system to perform certain actions, such as "add a new case" or "manage people and facilities".

- **Role**: A group of permissions makes up a role. For example, one role is a Provider Site. This role has permissions such as "add a new case" or "edit immunizations given at own site". The role of DPH Admin comes with additional permissions, such as the ability to manage people and facilities and run coverage reports. The Provider performs different job functions and therefore has a different set of permissions than a DPH Admin.

- **Group**: Users are members of groups based on the provider facility. Each provider facility may only see and/or modify those facility or immunization records that they have permissions to view and/or modify.

CIRTS ROLES

There are four roles in CIRTS:

- **DPH Super Administrator:** This is the highest level role. It has permissions to access all CIRTS functions and it is limited to DPH only. Users with this role can:

  1. Log into the CIRTS Administration application
  2. Modify all user accounts
  3. Create, modify, and delete immunization and facility records
  4. View and print CIRTS reports
  5. Access CIRTS workflows
  6. Import and export records
  7. Create, modify, and assign tasks and concerns
  8. Deduplicate case records
  9. Access all CIRTS case functionality

- **DPH Administrator**: This role is granted to DPH Administrators. Users with this role can:

  1. Create and modify immunization and facility records
  2. View and print CIRTS reports
  3. Import and export rosters
  4. Access all CIRTS case functionality
  5. Import and export records
  6. Create, modify, and assign tasks and concerns
  7. Deduplicate case records

- **DPH Staff:** Users with this role can:

  1. Create and modify immunization records
  2. View facility records
  3. View and print CIRTS reports
  4. Create, modify, and assign tasks and concerns

- **Provider Site**: Users with this role can:

  1. Create and modify immunization records
  2. Modify the facility record for their assigned group
  3. View and print CIRTS reports
  4. Create, modify, and assign tasks and concerns

LOGGING IN

CIRTS is accessed through a web browser.

Please use Internet Explorer version 7.0 or greater the first time you login

To log into CIRTS, follow these steps:

Open an Internet browser and type the URL provided to you from the DPH

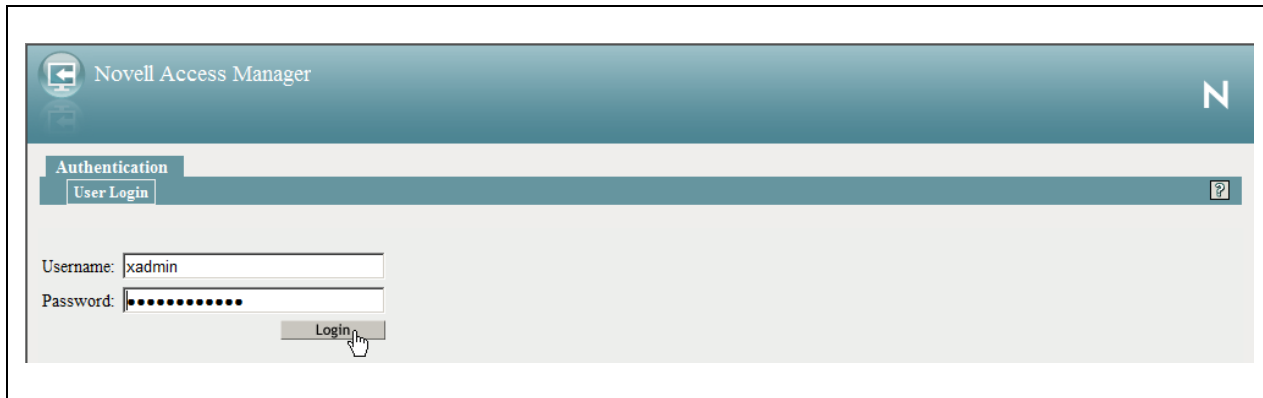1. Click the **Go** button *or* press the **Enter** key.

   The following Login screen will appear:

2. Enter your assigned **Username** and **Password** in the appropriate text boxes.

Caution: Username and Password are case sensitive so be sure to enter them exactly as they were provided. For example, XYZ123 is not the same password as xyz123.

3. Click the **Login** button.

The CIRTS Splash screen will display. CIRTS will also revert to this Splash screen when no record is open (loaded).

THE CIRTS SPLASH SCREEN

Overview
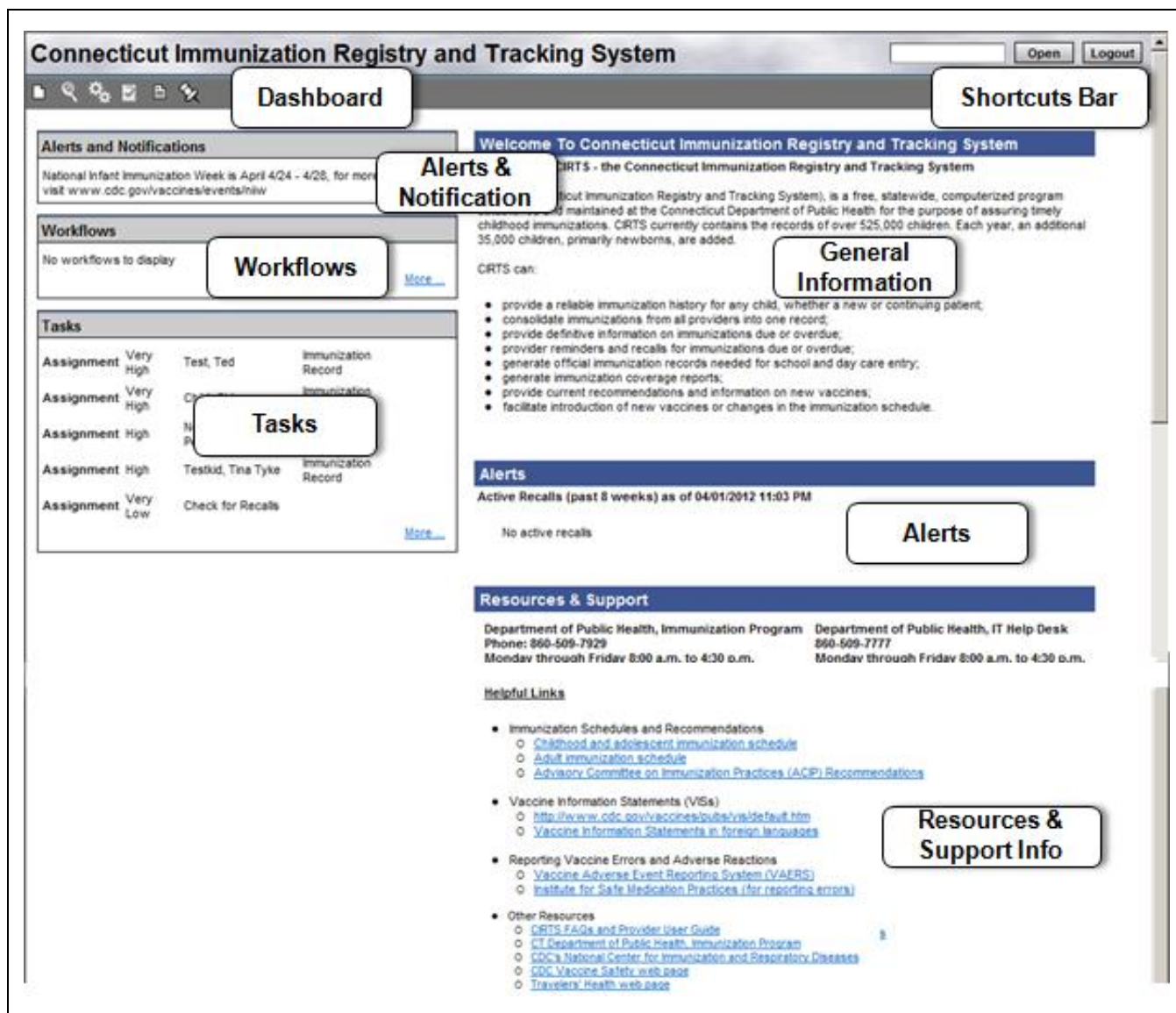
The CIRTS Splash screen is divided into eight separate areas:

1. **Dashboard**: has icons that perform the majority of the functions within the application. Depending on a user's role, the number of buttons in the toolbar may vary

2. **Shortcuts Bar**: has some buttons that users might use to quickly perform an action (such as Open a case or Logout of the application) within CIRTS

3. **Alerts & Notifications**: will appear only if CIRTS has active alerts or notifications and provides information regarding active news alerts

4. **Workflows**: displays Workflow queues with summary information and links to the displayed queues – at this time, there are no Workflow queues for Provider Sites

5. **Tasks**: displays a list of tasks assigned to the user with summary information and links to the displayed tasks

6. **General Information**: provides an overview of CIRTS functionality

7. **Alerts**: provides Alert information regarding active recalls/shortages of vaccines and news alerts

8. **Resources & Support Info**: contains Help Desk contact information for CIRTS system support and problem reporting; also contains links to helpful information such as Immunization Schedules and Vaccine Information Statements

SPLASH SCREEN NAVIGATION

The Splash screen has a toolbar that provides tools to create new records, search for existing records, access workflows and tasks, open reports, and find recent records. The Splash screen also provides links to Workflow Queues, Tasks, and helpful links.

Workflows queues:

1. At this time, there are no Workflow queues for Provider Sites. This section will only display Workflows for DPH users.
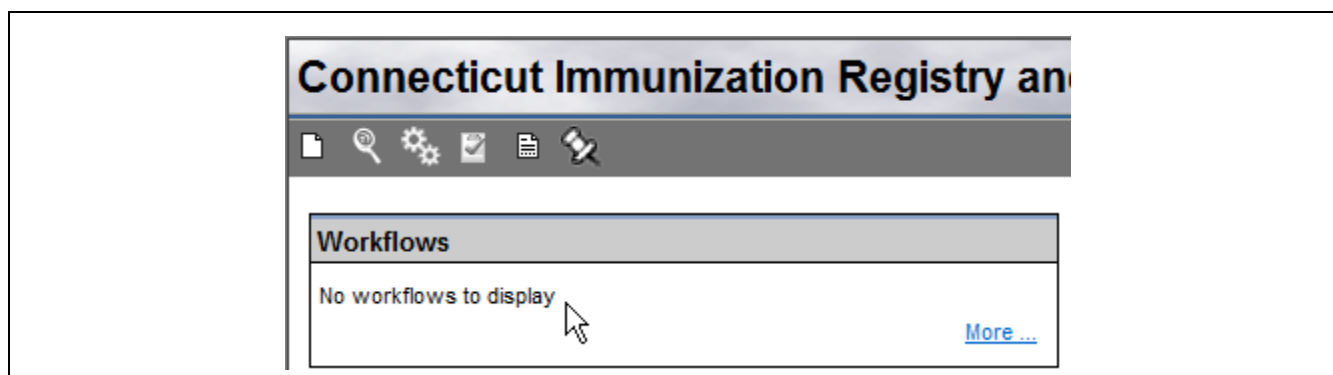
To display a task:

1. Click the link for the appropriate task.
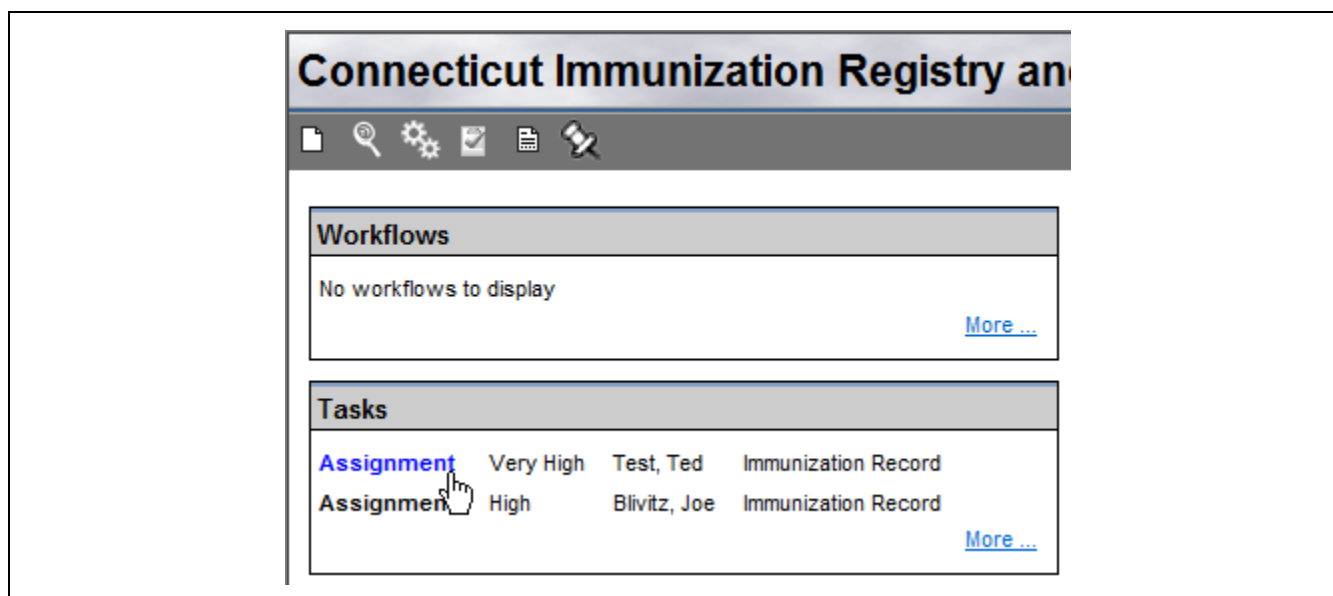
The Task Information screen for the selected task will display.

Edit Task

Task Information	
Immunization Record:	100084349 - Immunization Record - Ted Test
Type:	Assignment
Status:	Pending
Created By:	Sally Someone [sbsite]
Create Date:	02/05/2012
Last Update:	02/05/2012
Priority:	Very High
Due Date:	02/10/2012
Start Date(mm/dd/yyyy):	
Complete Date:	
Description:	An Important task
Notes:	Please do this ASAP!
Assign to user:	Sally Someone [sbsite] [Assign to me]
Assign to group:	

Save   Cancel

2. Refer to the instructions in Chapter 17 (Tasks) of this guide for complete information on using tasks.

Alerts

The Alerts area of the Splash screen provides information about active recalls/shortages of vaccines and news alerts.

Alerts and Notifications

National Infant Immunization Week is April 4/24 - 4/28, for more info, visit www.cdc.gov/vaccines/events/niiw

Please note: the TdaP is not forecasting correctly at this time. We are working on resolving this issue

Resources and Support

The Resources & Support area contains Help Desk contact information for CIRTS system support and problem reporting; it also contains links to helpful information such as Immunization Schedules and Vaccine Information Statements

Resources & Support

Department of Public Health, Immunization Program
Phone: 860-509-7929
Monday through Friday 8:00 a.m. to 4:30 p.m.

Department of Public Health, IT Help Desk
860-509-7777
Monday through Friday 8:00 a.m. to 4:30 p.m.

Helpful Links

- Immunization Schedules and Recommendations
    - Childhood and adolescent immunization schedule
    - Adult immunization schedule
    - Advisory Committee on Immunization Practices (ACIP) Recommendations

- Vaccine Information Statements (VISs)
    - http://www.cdc.gov/vaccines/pubs/vis/default.htm
    - Vaccine Information Statements in foreign languages

- Reporting Vaccine Errors and Adverse Reactions
    - Vaccine Adverse Event Reporting System (VAERS)
    - Institute for Safe Medication Practices (for reporting errors)

- Other Resources
    - CIRTS FAQs and Provider User Guide
    - CT Department of Public Health, Immunization Program
    - CDC's National Center for Immunization and Respiratory Diseases
    - CDC Vaccine Safety web page
    - Travelers' Health web page

The current links in the resources & Support area include:

- Immunization Schedules & Recommendations

- Vaccine Information Statements (VISs)

- Reporting Vaccine Errors and Adverse reactions

- Other Resources (CDC sites, etc.)

To open a link:

1. Point to one of the links with your mouse and click.
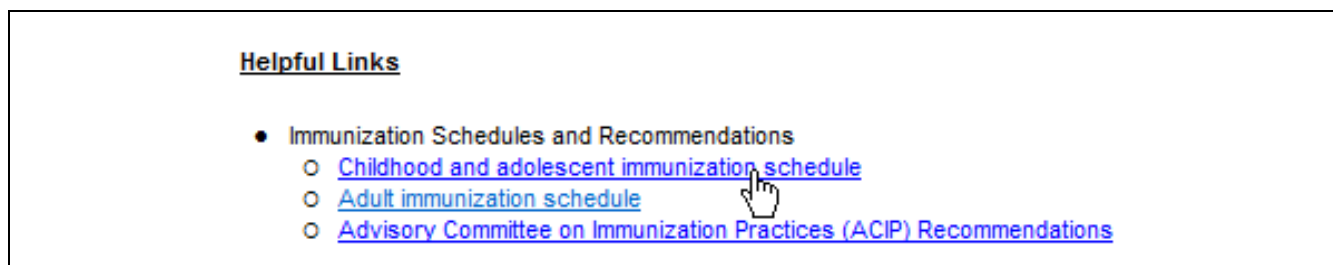
The selected site will open in its own new window.
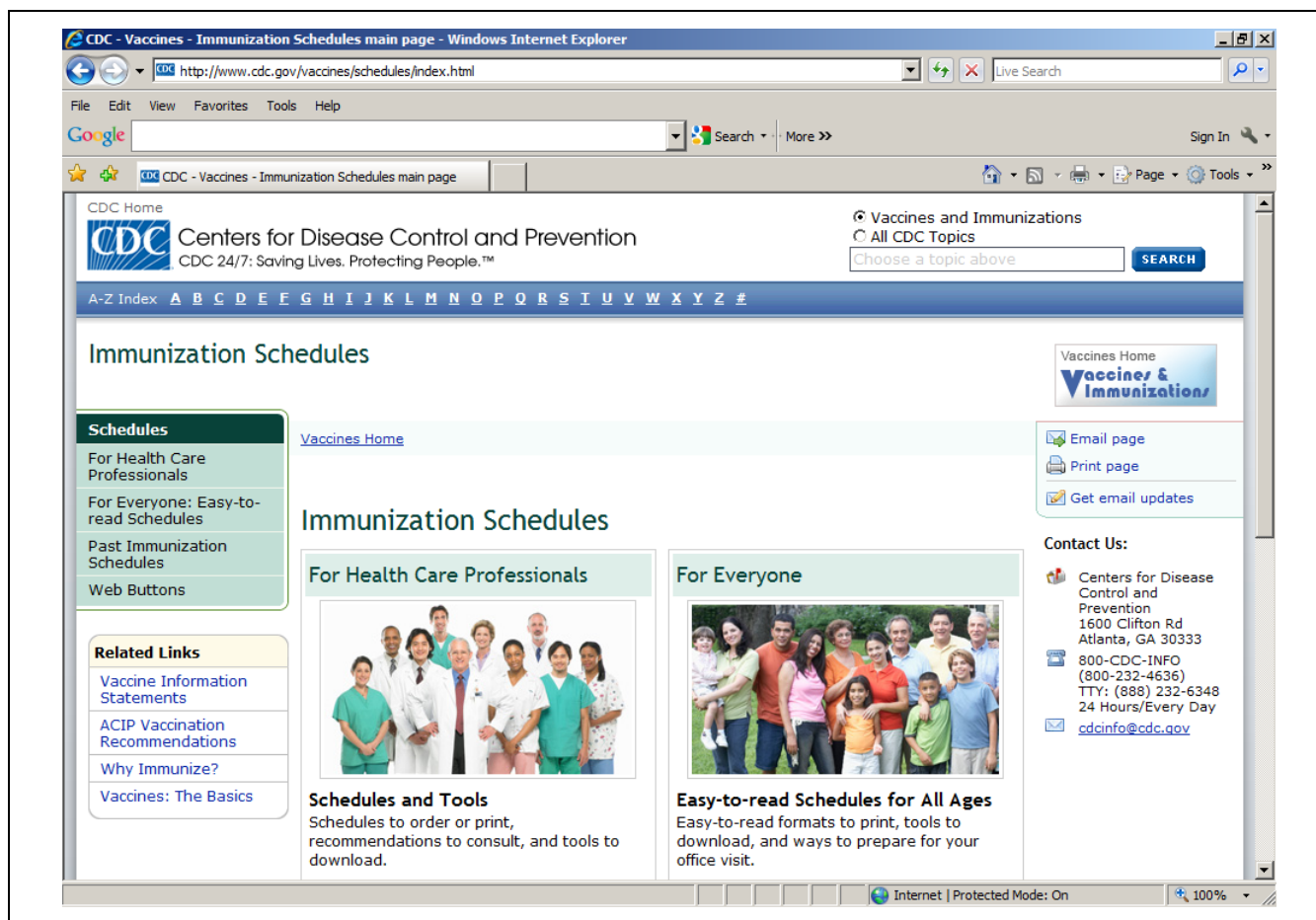
2. When the selected site is closed, you will be returned to the CIRTS Splash screen.

LOGGING OUT

Because of the sensitive nature of the data in the CIRTS, each user should exercise care when using the system. The CIRTS system is only as secure as the person using it. Therefore:

- Never share a password or use another user's password or login name

- Always log out of the system whenever you leave your computer

To log out of CIRTS, follow these steps:

1. Click the **Logout** button in the upper right corner of either the CIRTS Splash screen or the CIRTS Main screen.
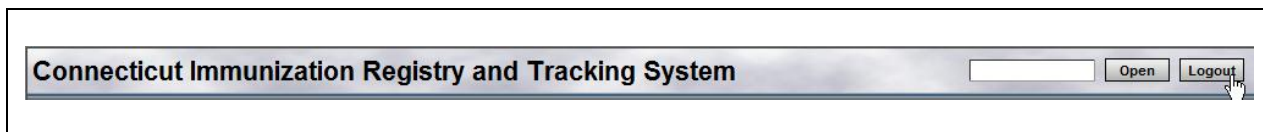
This action will end the Maven CIRTS session and display the following message:
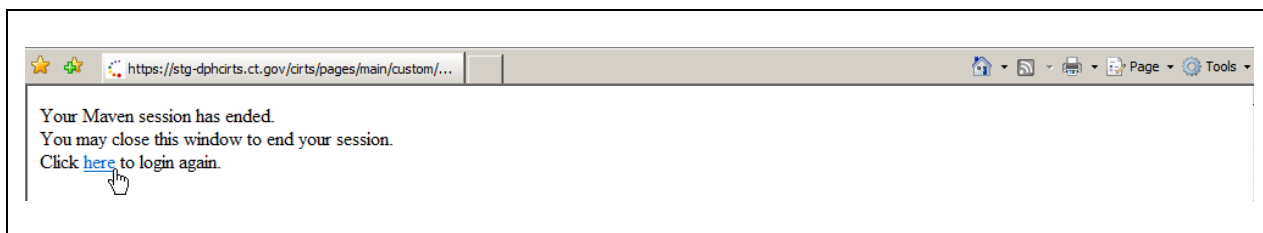
2. Click the **here** hyperlink to log back into CIRTS or close the window to end the session.

OPERATING IN THE MAVEN CIRTS ENVIRONMENT

While CIRTS is a very intuitive environment, there are a few general operating rules that a user must know to use the system efficiently and avoid problems

- Always use the command buttons and links provided by CIRTS

- Use the Tab key or the mouse to navigate between data fields

- **Do not** use the Enter key to navigate between data fields

- **Do not** use the web Browser's Back button

- CIRTS will time-out after twenty minutes of inactivity

SYSTEM PASSWORDS

Note that passwords do expire every 60 days. On the 60th day, the system will start to warn the user that the password will expire. There is no limit to the number of times that a user can unsuccessfully attempt to login to CIRTS; the system will never lockout a user account. If a user forgets the Username or Password, the user must contact a DPH System Administrator to reset the password and regain access to the system.

The CIRTS requires users to establish "strong" passwords with the following requirements:

- Must be 8-12 characters in length

- Must contain at least one number

- Must contain at least one alpha character

- Must contain at least one symbol

- Are case sensitive

- The system will not allow the re-use of a previously used password

Remember: Passwords are case-sensitive. For example, XYZ123 is not the same password as xyz123.

Only DPH System Administrators can reset system passwords. Provider Site users must contact the DPH Help Desk at 860-509-7777 to resolve any password or account problems.

Chapter 2: The Main Application CIRTS Environment

OVERVIEW

Purpose

Describe the basic operating environment of CIRTS

Objectives

- Explain the four elements of the CIRTS environment

    1. The CIRTS Dashboard

    2. Shortcuts Bar

    3. Immunization/Organization Record

    4. Patient/Facility Information

THE CIRTS ENVIRONMENT

The CIRTS environment is divided into four separate areas:

1. **Dashboard**: has icons that perform the majority of the functions within the application. Depending on a user's role, the number of buttons in the toolbar may vary. For example, a DPH Administrator user will see the "Manage People and Facilities" icon, while Provider Site user will not see that icon because the assigned role does not permit that action.

2. **Shortcuts Bar**: has some buttons that users might use to quickly perform an action (such as Open a case or Logout of the application) within CIRTS.

3. **Immunization/Organization Record**: contains summary information specific to each immunization or organization record depending on the type of record that has been opened. If an immunization record was opened, the section will have the heading "Immunization Record". If a facility record was opened, the section will have the heading "Organization Record".

4. **Patient/Facility Information**: contains the detailed information about the immunization record or facility record depending on the type of record that has been opened. If an immunization record was opened, the section will have the heading "Patient Information". If a facility record was opened, the section will have the heading "Facility Information".

CIRTS Main Screen for a Facility Record

Connecticut Immunization Registry and Tracking System

Dashboard

Shortcuts Bar

Organization Record

Summary Information

CIRTS ID:	100001739 Facility ID:1005 [Read Only]
Record Type:	Facility
Client:	Tester Pediatrics Phone: (860) 123-4567
Case Dates:	Create Date: 08/04/2012
Case Status:	Open

Organization Record

Edit Case Properties

Facility Information

Facility Data	Facility Info	Tasks

Facility Information

Question Packages

QUESTION PACKAGE	FACILITY	LAST UPDATE	UPDATED BY
Facility Demographics	Record	08/04/2012	Sally Admin [sbadmin]

View Question Package

CIRTS Main Screen for an Immunization Record

THE DASHBOARD

The CIRTS Dashboard is the point from which most actions take place. Here are some examples of what users can access from this screen:

- Create a new immunization record

- Search for an existing immunization or facility record

- Utilize question packages to enter immunization data

- View a task

- View reports

The design of the CIRTS is "context-sensitive". This means that the content of toolbars and dialog boxes will change according to the current login role. For example, when you first log into the system and before a CIRTS record is opened, the following generic Dashboard icons will be displayed.

Generic and Immunization Record Dashboard Icons
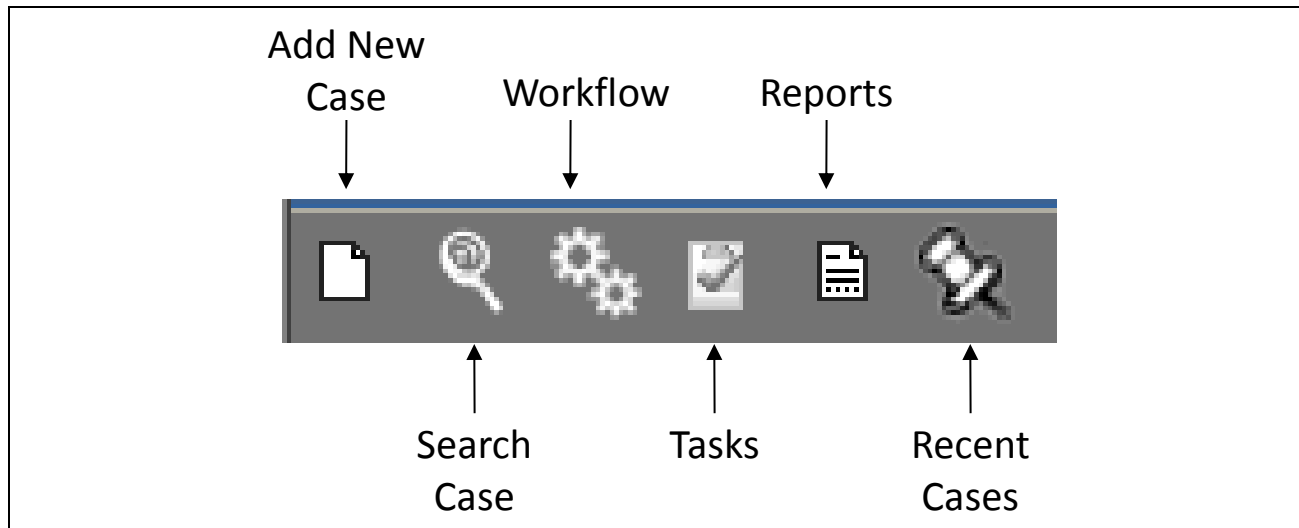
The same icons will be displayed when an Immunization record is created or opened.

When a Facility record is created or opened, the Dashboard icons will change to be specific to a Facility record. The CIRTS Facility record Dashboard icons are illustrated below. Note that there is no "Add a New Case" icon in the Facility record Dashboard; only DPH Administrators can create a Facility record.

Facility Record Dashboard Icons

Recent
Cases

Workflow   Reports

Search   Manage
Case   Tasks   Organizations
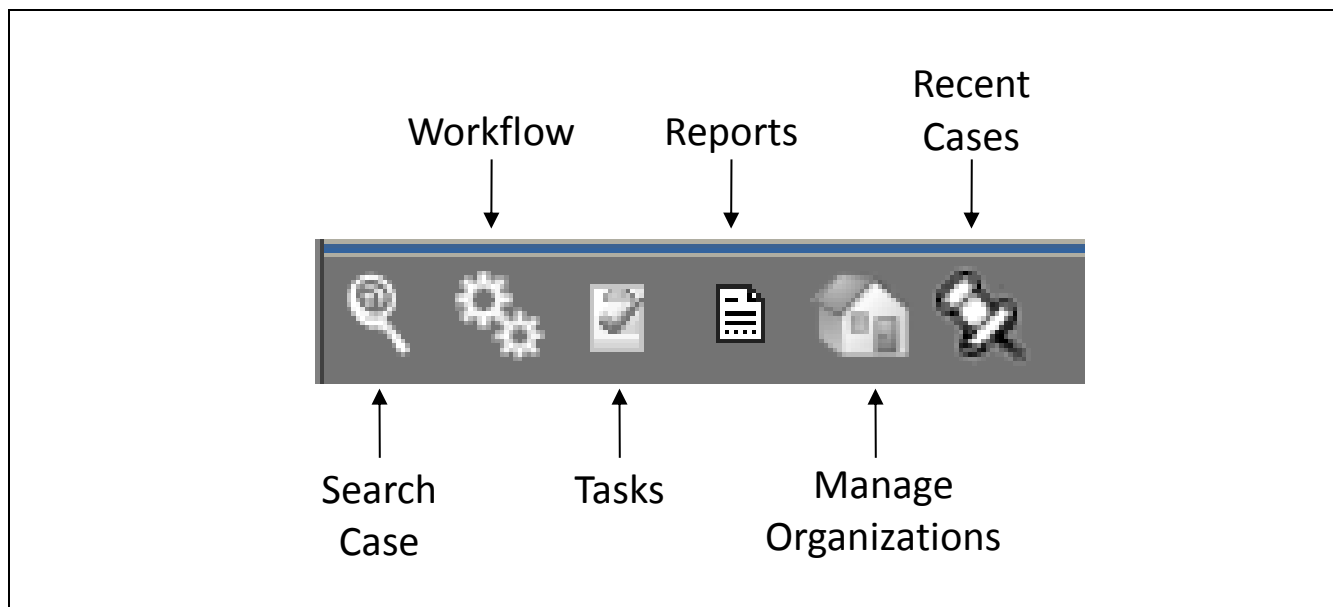
CIRTS DASHBOARD ICONS

	Add New Case	Used to create a new immunization record – facility records cannot be created by Provider Site users
	Search Case	Used to search for an existing immunization or facility record based on various search criteria
	Workflow	Used to view user specified workflow queues – at this time, there are no Workflows available to Provider Site users
	Tasks	Used to create, assign, and update status of specific tasks
	Reports	Used to view and print report data entered in CIRTS
	Manage Organizations	Used to enter information about the Facility such as Name, type, and Address
	Recent Cases	Provides easy access to the previous 30 cases that have been worked on by the current user

SHORTCUTS BAR

The Shortcut buttons allow the user to quickly:

- **Open**: To locate a record by its CIRTS ID, enter the Record ID in the textbox and click the **Open** button.

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> The CIRTS ID is system generated and can change - please confirm that the correct child record is displayed.

- **Logout**: To logout of the system, click the **Logout** button. This action will take the user back to the login screen.

IMMUNIZATION/ORGANIZATION RECORD

The Immunization/Organization section contains summary information specific to each immunization or organization record depending on the type of record that has been opened. If an immunization record was opened, the section will have the heading "Immunization Record". If a facility record was opened, the section will have the heading "Organization Record".

This section is divided into two parts:

- Summary Information

- Edit Record Properties button

The Edit Record Properties button opens the Edit Record Properties dialog box when clicked. This feature is not available to the Provider Site role.

Immunization Record	
Summary Information	
CIRTS ID:	100084351 Deduplication Status: Pending
Record Type:	Immunization Record
Client:	Tina Testkid Birth Date(mm/dd/yyyy): 01/01/2006 (6 y 1 m Female) Phone: (860) 123-4567
Case Status:	Open
Immunization Summary, Forecast & Schedules:	**Refusing Hep B**
	Summary and Forecast: Immunization Summary Immunization Forecast Immunization Certificate
	CDC Schedules : 0-6 yrs Schedule 7-18 yrs Schedule Catch-up Schedule Simplified Schedule Adult Immunization
	Overdue Vaccines: **DTP/aP, HepA, HepB, Influenza, MMR, Polio, Varicella**
	Vaccines Due: **MCV**
	Enrolled in CIRTS: Yes
	VFC Status/Insurance: Unknown / Privately Insured : N/A
Edit Case Properties	

SUMMARY INFORMATION

The Summary Information section highlights the following subjects for every record.

Summary Information	
CIRTS ID:	100084351 Deduplication Status: Pending
Record Type:	Immunization Record
Client:	Tina Testkid Birth Date(mm/dd/yyyy): 01/01/2006 (6 y 1 m Female) Phone: (860) 123-4567
Case Status:	Open
Immunization Summary, Forecast & Schedules:	**Refusing Hep B** **Summary and Forecast:** Immunization Summary Immunization Forecast Immunization Certificate **CDC Schedules :** 0-6 yrs Schedule 7-18 yrs Schedule Catch-up Schedule Simplified Schedule Adult Immunization **Overdue Vaccines:** DTP/aP, HepA, HepB, Influenza, MMR, Polio, Varicella **Vaccines Due:** MCV **Enrolled in CIRTS:** Yes **VFC Status/Insurance:** Unknown / Privately Insured : N/A

CIRTS ID	The unique record number automatically assigned by the CIRTS is displayed here
Record Type	The type of CIRTS record: Immunization or Facility
Client	The client about whom data is entered when a record is input into CIRTS - clicking the name link displays the Client/Facility Summary which provides additional demographic information • Contains Name, Birth Date, and Phone for Immunization record • Contains name and Phone for Facility record
Case Dates	Displays for Facility records only – contains the record Create Date
Case Status	The current status of the CIRTS record: Open or Closed
Immunization Summary, Forecast & Schedules	Displays for Facility records only –contains links to: • Client's Immunization Summary, Forecast, and Certificate • CDC Schedules • Due and Overdue vaccines • CIRTS enrollment status • VFC/Insurance status

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⚠️ If there is an open Concern (with a Severity of Very High) on the record, the Concern will be displayed in red text at the beginning of the Immunization Summary, Forecast & Schedules section. Refer to the instructions in Chapter 6 (Concerns) of this guide for complete information on using Concerns.

PATIENT/FACILITY INFORMATION

The Patient/Facility Information contains the detailed information about the immunization record or facility record depending on the type of record that has been opened. If an immunization record was opened, the section will have the heading "Patient Information". If a facility record was opened, the section will have the heading "Facility Information".

The Patient/Facility Information section is divided into two smaller sections:

- Tabs

- Basic Information or Details

The Basic Information/Details will change based on which of the Patient/Facility Information Tabs is activated. A Record Tab is activated by clicking on it.

Patient Information for an Immunization Record

Facility Information for a Facility Record

Facility Information

| Facility Data | Facility Info | Tasks | **Tabs** |

Question Packages

QUESTION PACKAGE	FACILITY	LAST UPDATE	UPDATED BY
Facility Demographics	Record	08/04/2012	Sally Admin [sb

Basic Information/Details

View Question Package

PATIENT INFORMATION TABS

The Patient Information Tabs section has five tab buttons:
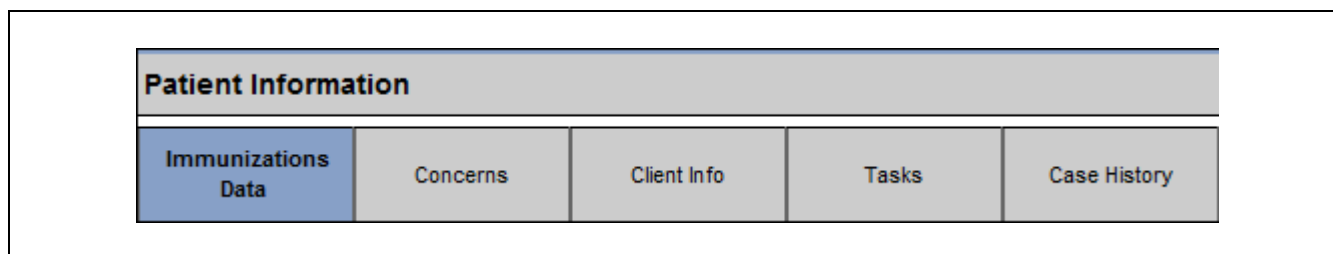
Immunization Data	Clicking the **Immunization Data** tab presents the user with the question packages specific to the record
Concerns	Clicking the **Concerns** tab allows the user to view and add concerns/issues regarding the record - currently, there are five levels of Concerns severity in CIRTS
Client Info	Clicking the **Client Info** tab allows the user to view demographic information for the client - only DPH Administrators can edit Patient Information in the Client Info tab
Tasks	Clicking the **Tasks** tab allows the user to view and add tasks to the open record - tasks will display here regardless of who is assigned the task
Case History	Clicking the **Case History** tab will display a chronological list of changes that have been applied to the record

PATIENT INFORMATION: IMMUNIZATION DATA

The Immunization Data section contains the record's Question packages.

Patient Information

| Immunizations Data | Concerns | Client Info | Tasks | Case History |

Question Packages

QUESTION PACKAGE	CLIENT	LAST UPDATE	UPDATED BY
01. Medical Home	Immunization Record	02/11/2012	sbsite
02. Demographics	Immunization Record	02/11/2012	sbsite
03. CIRTS Consent	Immunization Record	02/11/2012	sbsite
04. Clinical Comments	Immunization Record	02/11/2012	sbsite
05. Immunization Detailed History	Immunization Record	02/11/2012	sbsite
06. Immunization Administration - Current Provider	Immunization Record	02/11/2012	sbsite
07. Immunization Administration - Historical Provider	Immunization Record	02/11/2012	sbsite
08. Insurance	Immunization Record	02/11/2012	sbsite
09. Electronic Birth Certificate Download	Immunization Record	02/11/2012	sbsite

    View Question Package

A Question Package is a group of questions that share a common theme. There are nine Question Packages for a CIRTS Immunization record: Medical Home, Demographics, CIRTS Consent, Clinical Comments, Immunization Detailed History, Immunization Administration – Current Provider, Immunization Administration – Historical Provider, Insurance, and Electronic Birth Certificate Download.

The Question Package table is divided into four columns. Those columns are:

Question Package	Identifies the title of the question packages
Client	Will always be "Immunization Record"
Last Update	Displays the date that each question package was last updated
Updated By	Identifies the CIRTS username for the user that made the last update or modification to the question package

The question package may be viewed either by selecting it and then clicking on the View Question Package button or by double-clicking on the question package title in the table.

                    View Question Package

PATIENT INFORMATION: CONCERNS

The Concerns tab is used to enter information regarding any concerns/issues that a Provider has about the client. If a Concern is assigned a Severity type of "High", the Concern will be displayed in red text at the beginning of the Immunization Summary section of the Immunization record.

The Concerns section is further divided into two sections:

- Concerns

- Concern – Details

The Concerns table is divided into six columns. Those columns are:

Concern	The Concern description entered by the Provider
Description	The Concern description entered by the Provider – same as the Concern field
Client	Indicates the name of the client involved in the concern

Last Update	Displays the date that the concern was last updated
Severity	Identifies the severity of the concern: Very Low, Low, Medium, High, Very High
Status	Refers to the current status of the concern - either Active or Resolved

To view or modify a concern:

1. Click on the concern in the Concerns table and then click the **Update Concern** button.

Concerns					
CONCERN	DESCRIPTION	CLIENT	LAST UPDATE	SEVERITY	STATUS
Refusing Hep B	Refusing Hep B	Tina Testkid	02/11/2012	Very High	Active

[Add Concern]   [Update Concern]

The Edit Concern dialog box will display.

Edit Concern - Tina Testkid - Immunization Record

Concern Information	
Concern:	Refusing Hep B
Description:	
Client:	Tina Testkid
Create Date:	02/11/2012
Last Update:	02/11/2012
Updated By:	sbsite
Severity:	Very High
Status:	Active
Notes:	This is an example of a user-generated concern

[Save]   [Cancel]

This screen allows the user to specify that the concern has been resolved and also allows the user to make a note which will persist throughout the life of the record.

2. Set the **Status** to Resolved: to indicate that someone has acknowledged the concern and the appropriate action has been taken.

3. Enter any appropriate **Notes**.

4. Click the **Save** button.

PATIENT INFORMATION: CLIENT INFO

The Client Info tab is used to view address or name information as well as to view other historical demographic information. Provider Site users may view, but not modify, client data in this section; only DPH Administrators have the system permissions to edit this data.

The Client Info section is further divided into three sections:

- Client Info Table

- Client Tabs

- Current Information

Patient Information

Immunizations Data	Concerns	Client Info	Tasks	Case History

Client Info

NAME	GENDER	BIRTH DATE(MM/DD/YYYY)	ADDRESS
Tina Testkid	Female	01/01/2006	1 Main Street, Hartford, CT 06001

Client Info Table

Edit Contact

Current Information	Address History	Demographic History

Client Tabs

Current Information

Name:	Tina Testkid
Alias:	
Birth Date(mm/dd/yyyy):	01/01/2006
Death Date (mm/dd/yyyy):	
Age:	6 y 1 m
Gender:	Female
Address:	1 Main Street Hartford, CT 06001
Country:	USA
Home Phone:	(860) 123-4567
Cell Phone:	
Work Phone:	
Email:	
GIS Info:	Pending

Current Information

The Client Info table is divided into five columns. Those columns are:

Name	Indicates the name of the client in the immunization record
Gender	Indicates the Gender of the client: Male, Female, Transgender
Birth Date	Indicates the date of birth of the client
Address	Displays the current address of the client
Status	Refers to the current status of the client: Active, Deceased, Moved Out of State

The Client Tabs section has three tabs: Current Information, Address History, and Demographic History.

Current Information	Address History	Demographic History

Current Information	Contains information such as client Full Name, Birth Date, Gender, Address, and Phone
Address History	Contains information for the current and other historical address(es)
Demographic History	Contains current and historical client information such as client First Name, Last Name, Middle Name, Birth Date, and Gender

Important: The Current Information, Address History, and Demographic History tabs are for DPH Administration use only. Provider Site users should refer to the information in the Demographics Question Package to view or modify client information. In order to change the phone and address information of a child, the information must be changed in the Responsible Care Giver(s) Information section of the question package.

Current Information:

Current Information	Address History	Demographic History

Current Information

Name:	Tina Testkid
Alias:	
Birth Date(mm/dd/yyyy):	01/01/2006
Death Date (mm/dd/yyyy):	
Age:	6 y 1 m
Gender:	Female
Address:	2 Another Address Hartford, CT 06001
Country:	USA
Home Phone:	(860) 987-6543
Cell Phone:	
Work Phone:	
Email:	
GIS Info:	Pending

Current Information

Address History:

	Current Information	**Address History**	Demographic History		

Address History

TYPE	ADDRESS		PHONE
	2 Another Address, Hartford, CT 06001		(H) (860) 987-65
Home	1 Main Street, Hartford, CT 06001		(H) (860) 123-4

Add Address	Edit Address	Remove Address

Address History

Start Date(mm/dd/yyyy):	01/01/1900
End Date (mm/dd/yyyy):	01/01/2030
Address:	2 Another Address Hartford, CT 06001
Country:	USA
Home Phone:	(860) 987-6543
Cell Phone:	
Work Phone:	
Email:	
GIS Info:	Pending

> **Address History**

Demographic History:

Current Information	Address History	Demographic History

Demographic History	
Start Date(mm/dd/yyyy):	02/12/2012
End Date (mm/dd/yyyy):	01/01/2030
First Name:	Tina
Middle Name:	Tyke
Last Name:	Testkid
Birth Date(mm/dd/yyyy):	01/01/2006
Death Date (mm/dd/yyyy):	
Gender:	Female
Alias:	
Mother's Maiden Name:	Doe
Start Date(mm/dd/yyyy):	01/01/1900
End Date (mm/dd/yyyy):	02/12/2012
First Name:	Tina
Middle Name:	
Last Name:	Testkid
Birth Date(mm/dd/yyyy):	01/01/2006
Death Date (mm/dd/yyyy):	
Gender:	Female
Alias:	
Mother's Maiden Name:	Doe

Demographic History

If changes are made to the Demographic History data, historical information will be displayed along with the current information. In the above example, a Middle Name was added to the client record; the Demographic History displays the current information in the table followed by the historical information.

PATIENT INFORMATION: TASKS

The Tasks tab provides information about the tasks associated with the open record.

The Tasks section is further divided into two sections:

- Tasks Table: The tasks associated with the open record will display in the table at the top of the section

- Details: Details about a selected task will display in the bottom of the section

The Tasks table is divided into seven columns. Those columns are:

Type	Displays the type of the task: will always be Assignment

Status	Displays the current status of the task: Pending, In Progress, Completed
Priority	Indicates the task priority as set by the task creator: Very Low, Low, Medium, High, Very High
Due Date	Displays the date that the task is due to be completed
Description	Displays the short description of the task
Assigned To	Indicates the user assigned to perform the task
Assigned To Group	Indicates the group assigned to perform the task

The Add Task feature will be available (or not) based on the assigned user permissions.

The Details section will display summary information about the selected Task.

Details	
Type:	Assignment
Status:	Pending
Priority:	High
Description:	Possible duplicate record
Assigned To:	Sally Someone
Assigned To Group:	
Create Date:	02/11/2012
Created By:	Sally Someone
Last Update:	02/11/2012
Updated By:	Sally Someone
Due Date:	02/24/2012
Start Date(mm/dd/yyyy):	
Complete Date:	
Notes:	This child may already be in the system - please search and verify

Type	Displays the task type: will always be Assignment
Status	Displays the current status of the task: Pending, In Progress, Completed
Priority	Indicates the task priority as set by the task creator: Very Low, Low, Medium, High, Very High
Description	Displays the short description of the task
Assigned To	Indicates the user assigned to perform the task
Assigned To Group	Indicates the group assigned to perform the task
Create Date	Displays the date that the task was created
Created By	Identifies the user that created the task
Last Update	Displays the date that the task was last updated

Updated By	Identifies the user that made the last update or modification to the task information
Due Date	Displays the date that the task is due to be completed
Start Date	Displays the date that the task was started
Complete Date	Displays the date that the task was completed
Notes	Displays any notes attached to the task

PATIENT INFORMATION: CASE HISTORY

The Case History tab provides information about changes that have been applied to the open immunization record.

The change information will be displayed in chronological order with the oldest change at the top of the list.

The Case History table is divided into four columns. Those columns are:

Time	Displays the date and time that the change was applied
Event	Displays the type of change that was applied
Message	Displays more specific information about the change that was applied
User	Displays the login ID of the user who made the change

FACILITY INFORMATION TABS

The Facility Information Tabs section has three tab buttons:

Facility Information

| Facility Data | Facility Info | Tasks |
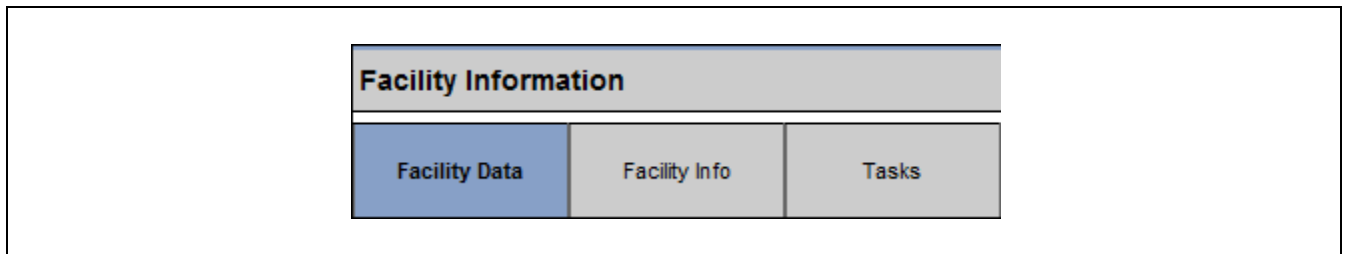
Facility Data	Clicking the **Facility Data** tab presents the user with the question packages specific to the facility record
Facility Info	Clicking the **Facility Info** tab allows the user to view demographic information for the client - only DPH Administrators can edit Facility Information in the Facility Info tab.
Tasks	Clicking the **Tasks** tab allows the user to view and add tasks to the open record - tasks will display here regardless of who is assigned the task

FACILITY INFORMATION: FACILITY DATA

The Facility Data section contains the record's Question packages:

A Question Package is a group of questions that share a common theme. At this time, there is one Question Package for a CIRTS Facility record: Facility Demographics.

The Question Package table is divided into four columns. Those columns are:

Question Package	Identifies the title of the question package
Facility	Will always be "Record"
Last Update	Displays the date that each question package was last updated
Updated By	Identifies the CIRTS username for the user that made the last update or modification to the question package

The question package may be viewed either by selecting it and then clicking on the View Question Package button or by double-clicking on the question package title in the table.

FACILITY INFORMATION: FACILITY INFO

The Facility Info tab is used to view address or name information as well as to view other historical demographic information. Provider Site users may view facility data in this section; they may only modify the information for their own facility. Only DPH Administrators have the system permissions to edit the data for all facilities.

The Facility Info section is further divided into three sections:

- Facility Info Table

- Facility Tabs

- Current Information

The Facility Info table is divided into three columns. Those columns are:

Name	Indicates the name of the facility in the facility record
Address	Displays the current address of the facility
Status	Refers to the current status of the facility: Active, Closed

The Facility Tabs section has three tabs: Current Information, Address History, and Demographic History.

Current Information	Address History	Demographic History
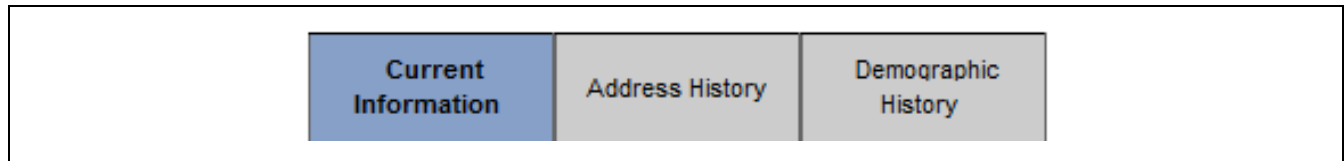
Current Information	Contains information such as Facility Name, Address, Phone, Email, and Fax
Address History	Contains information for the current and other historical address(es)
Demographic History	Contains current and historical facility information such as facility Name, Address, Phone, Email, and Fax

Current Information:

Current Information	Address History	Demographic History	
Current Information			
Name:	Tester Pediatrics		
Address:	1 Something Street Hartford, CT 06001		
Primary Phone:	(860) 123-4567	**Current Information**	
Secondary Phone:			
Email:			
Fax:	(860) 456-7890		
GIS Info:	Pending		

Address History:

Current Information	Address History	Demographic History

Address History

TYPE	ADDRESS		PHONE
	1 Something Street, Hartford, CT 06001		(H) (860) 123-456 (W) (860) 345-678
	1 Old Street, Hartford, CT 06001	Address History	(H) (860) 123-456

[Add Address] [Edit Address] [Remove Address]

Address History

Start Date(mm/dd/yyyy):	01/01/1900
End Date (mm/dd/yyyy):	01/01/2030
Address:	1 Something Street Hartford, CT 06001
Primary Phone:	(860) 123-4567
Secondary Phone:	(860) 345-6789
Email:	tester@something.com
Fax:	(860) 456-7890
GIS Info:	Pending

Demographic History:

Current Information	Address History	Demographic History

Demographic History

Start Date(mm/dd/yyyy):	02/12/2012
End Date (mm/dd/yyyy):	01/01/2030
Name:	New Tester Pediatrics
Start Date(mm/dd/yyyy):	01/01/1900
End Date (mm/dd/yyyy):	02/12/2012
Name:	Tester Pediatrics

If changes are made to the Demographic History data, historical information will be displayed along with the current information. In the above example, the facility was changed; the Demographic History displays the current information in the table followed by the historical information.

Please remember to notify DPH/CIRTS if any of your facility demographic information changes.

FACILITY INFORMATION: TASKS

The Tasks tab provides information about the tasks associated with the open facility record.

The Tasks section is further divided into two sections:

- Tasks Table: The tasks associated with the open record will display in the table at the top of the section

- Details: Details about a selected task will display in the bottom of the section

The Tasks table is divided into seven columns. Those columns are:

Type	Displays the type of the task: will always be Assignment
Status	Displays the current status of the task: Pending, In Progress, Completed

Priority	Indicates the task priority as set by the task creator: Very Low, Low, Medium, High, Very High
Due Date	Displays the date that the task is due to be completed
Description	Displays the short description of the task
Assigned To	Indicates the user assigned to perform the task
Assigned To Group	Indicates the group assigned to perform the task

The Add Task feature will be available (or not) based on the assigned user permissions.

The Details section will display summary information about the selected Task.

Type	Displays the task type: will always be Assignment
Status	Displays the current status of the task: Pending, In Progress, Completed
Priority	Indicates the task priority as set by the task creator: Very Low, Low, Medium, High, Very High
Description	Displays the short description of the task
Assigned To	Indicates the user assigned to perform the task
Assigned To Group	Indicates the group assigned to perform the task
Create Date	Displays the date that the task was created
Created By	Identifies the user that created the task
Last Update	Displays the date that the task was last updated
Updated By	Identifies the user that made the last update or modification to the task information

Due Date	Displays the date that the task is due to be completed
Start Date	Displays the date that the task was started
Complete Date	Displays the date that the task was completed
Notes	Displays any notes attached to the task

Chapter 3: Immunization Summary, Forecast, and Certificate

O V E R V I E W

Purpose

Explain how to view and print the Immunization Summary, Forecast, and Certificate for a client

---

Objectives

- View and print the Immunization Summary

- View and print the Immunization Forecast

- View and print the Immunization Certificate

IMMUNIZATION SUMMARY

To display the Immunization Summary

1. Click the **Immunization Summary** link in the Summary Information section of the immunization record.

The Immunization Summary screen will display in a new window in the browser.

2. Click the **Print** button in the browser to print the Immunization Summary.

Immunization Summary - Winnie Pooh

<u>**To display the Immunization Forecast**</u>

1. Click the **Immunization Forecast** link in the Summary Information section of the immunization record.

The Immunization Forecast screen will display in a new window in the browser.
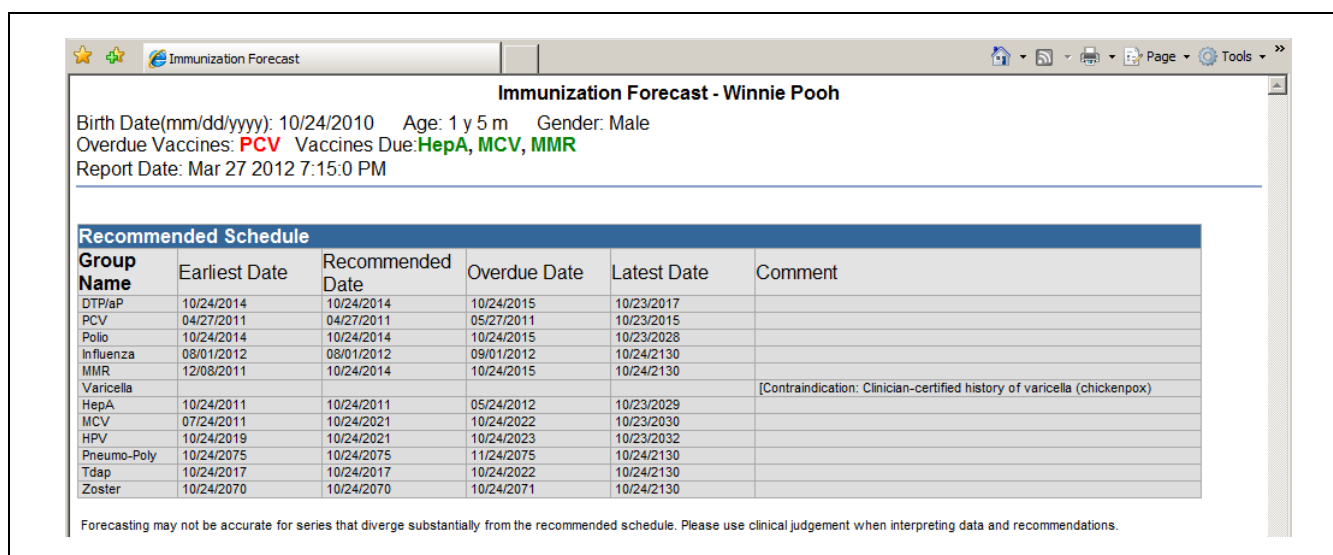
2. Click the **Print** button in the browser to print the Immunization Forecast.

Immunization Forecast - Winnie Pooh
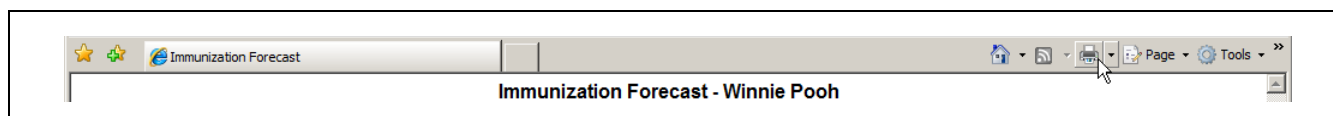
<u>**To display the Immunization Certificate**</u>

1. Click the **Immunization Certificate** link in the Summary Information section of the immunization record.

Immunization Record	
Summary Information	
CIRTS ID:	100084464
Record Type:	Immunization Record
Client:	Winnie Pooh Birth Date(mm/dd/yyyy): 10/24/2010 (1 y 5 m Male) Phone: (860) 867-5309
Case Status:	Open
Immunization Summary, Forecast & Schedules:	National Infant Immunization Week is April 4/24 - 4/28, for more info, visit www.cdc.gov/vaccines/events/niiw Please note: the TdaP is not forecasting correctly at this time. We are working on resolving this issue Summary and Forecast: Immunization Summary Immunization Forecast Immunization Certificate CDC Schedules : 0-6 yrs Schedule 7-18 yrs Schedule Catch-up Schedule Simplified Schedule Adult Immunization **Overdue Vaccines:** PCV **Vaccines Due:** HepA, MCV, MMR **Enrolled in CIRTS:** Yes **VFC Status/Insurance:** VFC-Not Eligible / Privately Insured : Anthem Blue Cross and Blue Shield
Edit Case Properties	

The Immunization Certificate screen will display in a new window in the browser.

2. Click the **Print** button in the browser to print the Immunization Certificate.

Chapter 4: Searching in the CIRTS Application

OVERVIEW

Purpose

Explain how to search for an existing Immunization or Facility record

Objectives

- Enter Search criteria

- Search Recent Records

- Use Wildcard searches

Before creating an immunization record (only DPH Administrators can create facility records), users should always perform a thorough search to see if the record has already been entered into the CIRTS system. This will help prevent duplicate information in the system and help ensure the integrity of the data.

SEARCHING

Often it is necessary to view an existing record for informational purposes or to find an existing record to add or change information. To search for an existing record, follow the steps below:

1. Click the **Search Case** button (the magnifying glass icon) on CIRTS Dashboard toolbar.
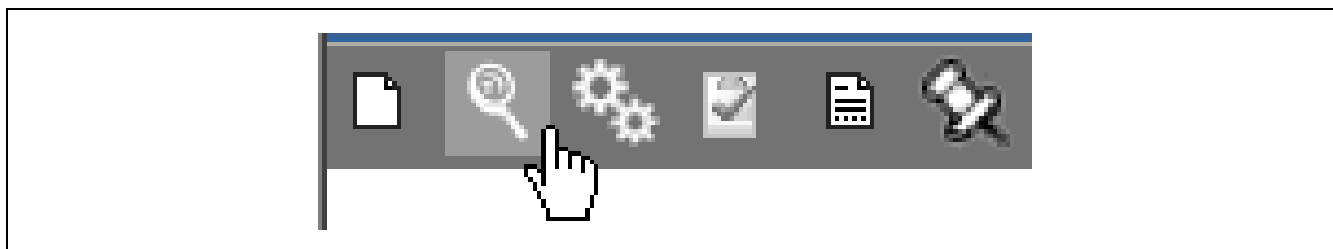
The Patient Search screen will appear.

2. Select either **Facility** or **Immunization Record** from the **Record Type** list box. *If you do not select a Record Type, your search will return no results – you will receive an error message below the Search Results table.*

Results of Patient Search

CIRTS ID	Client	Birth Date(mm/dd/yyyy)	Status	Report ID	Client Town/Facility Status	Maiden Name/Online Status

No product is selected. Please select a product first

3. The Search screen will change based on the selected record type.

Search Screen for an Immunization record

Patient Search

Search Criteria

Last Name:

First Name:

Alias:

Birth Date (mm/dd/yyyy):

Mother's Maiden Name:

City:

Record Type: Immunization Record

Mother's First Name:

Mother's Last Name:

Home Phone:

Results of Patient Search

CIRTS ID	Client	Birth Date(mm/dd/yyyy)	Status	Report ID	City	Mothers Maiden Name

No search done

Search Options

Sort By: Create Date

Sort Order: Descending

Search History: ☐

Search Soundex: ☐

Search   Clear

Use Selected Patient   Cancel

Search Screen for a Facility record

Facility Search

Search Criteria

Name:

Street Address:

City:

State:

Zip Code:

Record Type: Facility

Site ID:

Search Options

Sort By: Create Date

Sort Order: Descending

Search History: ☐

Search   Clear

Result of Facility Search

Search Results					
CIRTS ID	Facility	Create Date	Facility ID	Open Status	Online Status

No search done

Use Selected Facility   Cancel

4. Enter the appropriate **Search Criteria** (such as City, Last Name, First Name, and Birth Date).

CIRTS provides multiple search criteria to find cases. Please note: the more search criteria provided; the fewer results will display.

- **For an Immunization record search**: at least three criteria must be entered

- **For a facility record search**: only the Record Type field is required

Warning: The City field is case-sensitive! If the record was created with the city "HARTFORD" and "Hartford" is entered in the City field, the record will not be found. Most of the Immunization records will be electronically migrated into CIRTS and will be in upper case. For this reason, searching with **Caps Lock** on might be helpful in yielding the best Search results. All other Search criteria fields are not case-sensitive.

The Search criteria for an Immunization record are:

Last Name	Allows the user to specify the Last Name of the client
First Name	Allows the user to specify the First Name of the client
Alias	Allows the user to specify an alternate name (Alias) for the client
Birth Date	Enter Birth Date using the mm/dd/yyyy search format
Mother's Maiden Name	Allows the user to search by Mother's Maiden Name
City	Allows the user to specify the residence City associated with the client
Record Type	Select **Immunization Record**
Mother's First Name	Allows the user to specify the First Name of the client's mother
Mother's Last Name	Allows the user to specify the Last Name of the client's mother
Home Phone	Allows the user to specify the Home Phone number of the client
Sort By	Allows the user to specify which field to sort the results by: Create Date, CIRTS ID, Name
Sort Order	Allows the user to specify the order in which the results will be displayed: Ascending or Descending
Search History	Check this box to display the cases that were most recently accessed
Search Soundex	Check this box to perform a name Soundex search

The Search criteria for a Facility record are:

Name	Allows the user to specify the Name of the facility
Street Address	Allows the user to specify the residence Street Address associated with the facility
City	Allows the user to specify the residence City associated with the facility
State	Allows the user to specify the residence State associated with the facility

Zip Code	Allows the user to specify the residence Zip Code associated with the facility
Record Type	Select **Facility**
Site ID	Allows the user to specify the system-assigned Site ID for the facility
Sort By	Allows the user to specify which field to sort the results by: Create Date, Facility ID, Name
Sort Order	Allows the user to specify the order in which the results will be displayed: Ascending or Descending
Search History	Check this box to display the cases that were most recently accessed
Search Soundex	Check this box to perform a name Soundex search

Wildcard Searches

Searching within the CIRTS system supports wildcard characters. To use a wildcard, type an asterisk (*) wherever there are characters that you are unsure of.

To use a wildcard, at least one character must be specified in the search field in addition to the asterisk (*). The asterisk can be used anywhere in the search field (Ex: *Br*, *Br, Br*).

In the example below, entering "TE*" in the Name criteria for a Facility search returned five matching records.

Searching is also tied to security. Search results will only yield cases that the user has permissions to see.

For most date fields in CIRTS, the user may either type the date in mm/dd/yyyy format or select the date by clicking on it in the calendar.

5. Optionally: Select the appropriate **Search Options**.

6. Click the **Search** button to perform the search.

The Search Results will be displayed in a pane at the right of the Search Case dialog box.

If the search yields more results than will fit in the results pane, a scroll bar and a navigation bar will display. Click the appropriate navigation link (**<<First, <Prev, Next>, Last>>**) to find the correct results record.

It might be necessary to scroll down the screen to display the navigation links.

To see more of the record data than what is displayed in the Search Results table, click the Preview button to the right of the CIRTS ID to display the Case Information window.

7. If the search _does not_ find the case that you want, click the **Clear** button to re-set the search criteria to do a new search.

8. If the search _does_ find the case that you want, either:

  - **double-click** the results record

              or
  - click the results record and then click the **Use selected case** button to open the case in the Maven CIRTS Dashboard screen.

The user can now update, print, or review the case information as required.

RECENT CASES

A simple alternative to the regular Search is to use the Recent Cases button on the CIRTS toolbar. This option is a quick method of locating the thirty most recent records on which the user has worked.

1. Click the **Recent Cases** button (the push-pin icon) on the CIRTS Dashboard toolbar.
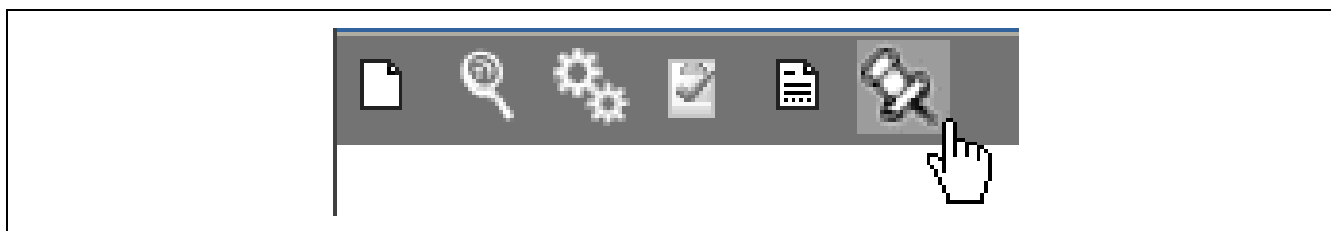
The Recent Cases will be displayed with up to thirty record results.

Recent Cases

CIRTS ID	Client	Status	Record Type	Client Town/Facility Status	Maiden Name/Online Status	Access Time	Bookmark
100084351	Testkid, Tina Tyke	Open	Immunization Record	Hartford	Doe	02/12/2012 04:23 PM	⭐
100084352	New Tester Pediatrics	Open	Facility	OPEN	OFFLINE	02/12/2012 03:41 PM	⭐
100000696	Baker Pediatrics	Open	Facility	CLOSED	OFFLINE	02/12/2012 02:59 PM	⭐
100008422	DIAZ, JENNISSE	Open	Immunization Record	HARTFORD	BENITEZ	02/11/2012 02:35 PM	⭐
100002260	Doe, John	Open	Immunization Record	Hartford		02/11/2012 02:33 PM	⭐
100084349	Test, Ted	Open	Immunization Record	Trumbull	Something	02/11/2012 02:30 PM	⭐
100084347	Blivitz, Joe	Open	Immunization Record	East hartford	Doe	02/11/2012 02:05 PM	⭐
100084348	Doe, Jane	Open	Immunization Record	Hartford	Jones	02/05/2012 08:28 PM	⭐

Home

CIRTS ID	Displays the system-assigned CIRTS ID of a specific record
Client #	The full name of the client
Status	The status of the client record For an Immunization record: Active, Deceased, or Moved Out of State For a Facility record: Open or Closed
Record Type	The type of client record: Facility or Immunization Record
Client Town/Facility Status	For an Immunization record: the town of residence of the client For a Facility record: Open or Closed
Maiden Name/Online Status	For an Immunization record: the maiden name of the client's mother For a Facility record: Online or Offline
Access Time	The date and time that the record was last accessed in CIRTS

2. Click the **CIRTS ID** link of the record to be opened. This action will close the Recent Cases window and will open the record in the CIRTS Dashboard.

3. To close the Recent Cases window without selecting and opening a case, click the **Home** button at the bottom of the screen to return to the CIRTS Dashboard window.

Duplicate Child Records

When an Immunization record is added, CIRTS will check existing records on key fields (name, address, date of birth, etc.) for a potential duplicate child record. If a potential match is found, the **Client Matches** screen will display.

1. Always check the **Mark as pending deduplication** box if you create a new case. This will ensure that DPH can review the record to verify that it is really not a duplicate.

2. If this *is not* a duplicate child, click the **Create new case and person** button.

3. If this *is* a duplicate child, click the **Use this existing record** link in the Patients list of the Potential Client Match Found section.

Chapter 5: Immunization Record Creation and Management

O V E R V I E W

Purpose

Explain how to create a new Immunization record in CIRTS

Objectives

- Create a new Immunization record

- Enter Client record information

- View record Concerns

- Change properties and client information for existing records

Provider Site users can create only Immunization records. Only DPH Administrators can create Facility records.

WORKING WITH RECORDS IN CIRTS

This chapter will focus on creating and modifying records.

The availability of some system functionality will vary according to the specific role of the user. For example, a user with the Provider Site role does not have the permissions to "Edit Case Properties" or "Add Address"; the buttons for those functions will be dimmed and unavailable.

To create an immunization record in CIRTS, complete the following steps:

1. **Before creating an immunization record, *always* perform a thorough search to see if the record has already been entered into the CIRTS system. This will help prevent duplicate information in the system and help ensure the integrity of the data**.

2. Click the **Add New Case** button (the "blank page" icon) on the CIRTS Dashboard toolbar.
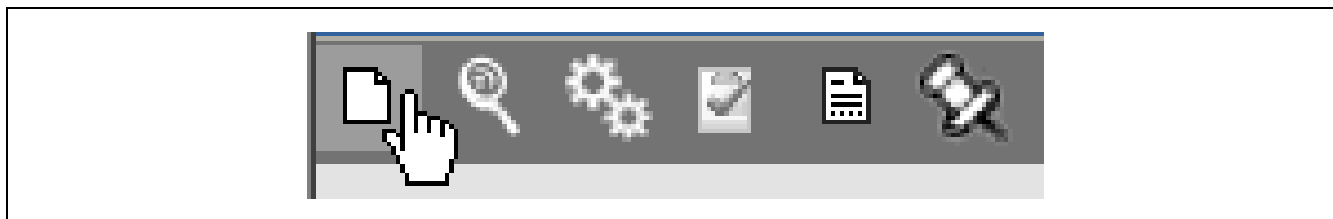
The Add New Patient screen will display.

The Add New Patient screen is divided into three separate sections:

- Record Information

- Patient Information

- Contact Information

RECORD INFORMATION

The first section is Record Information.

Add New Patient
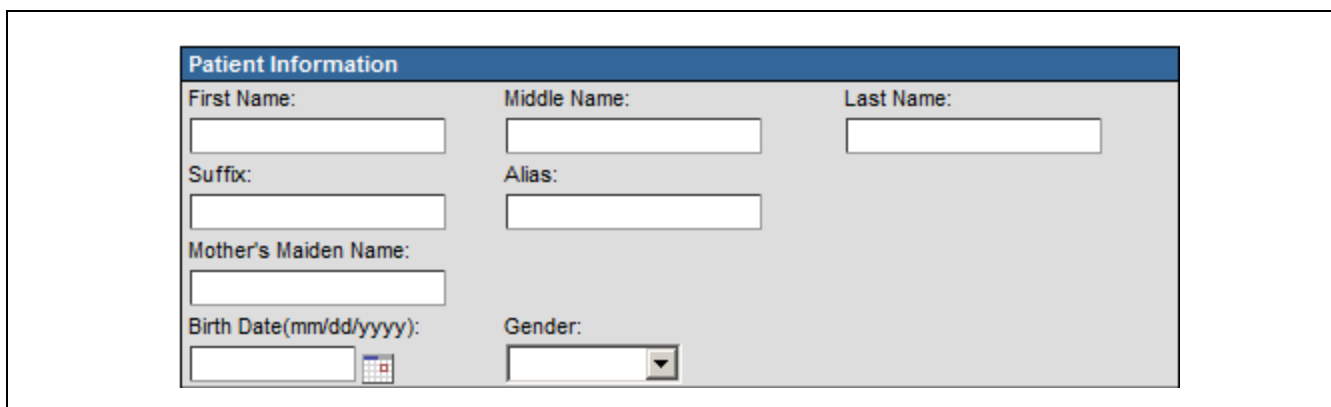
Record Information
Record Type: Immunization Record ▼

In the **Record Type** list, Immunization Record is the only option.

PATIENT INFORMATION

The second section is Patient Information.

Patient Information

First Name: Middle Name: Last Name:

Suffix: Alias:

Mother's Maiden Name:

Birth Date(mm/dd/yyyy):   Gender:

Remember: In order to avoid duplicate data entry, prior to creating the new record, the **Search** feature should be used to locate a client who may already be in CIRTS. See Chapter 4 in this guide for information related to Searching.

The Patient Information section requires the following fields:

- First Name
- Last Name
- Birth Date

3. Enter the Patient Information data field information

4. If the field data is not entered or if there is some other type of data entry error, an Error screen will display when the Save button is clicked

Add New Patient

Please correct the indicated errors before proceeding:
Date of birth not specified

Record Information
Record Type: [Immunization Record ▼]

Patient Information

First Name: [Har ry]   Middle Name: [ ]   Last Name: [Car ey]

Suffix: [ ]   Alias: [ ]

Mother's Maiden Name: [ ]

Birth Date(mm/dd/yyyy): [ ] 📅   Gender: [▼]

Contact Information

Address Type: [Home ▼]   Street Address: [1 Main Street]
[ ]

City: [Har tford]   State: [CT ▼]   Zip Code: [06001]

Country: [USA ▼]

Home Phone: [ ]   Cell Phone: [ ]   Work Phone: [ ]

Email: [ ]

[Clear Fields]
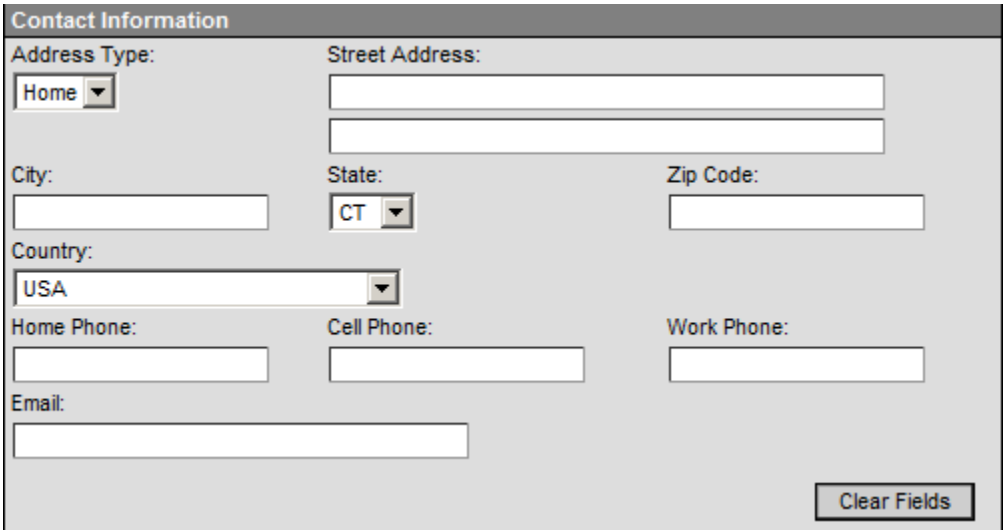
[Save]   [Cancel]

The patient record will not be created until the error is corrected and all required data has been entered.

CONTACT INFORMATION

The third section is Contact Information.

The Contact Information section requires the following fields:

- Street Address
- City
- Zip Code

Note that some fields (Address Type as Home and State as CT) are filled in by default, but if the information is incorrect, simply use the dropdown menu and select the appropriate entry. Any data that needs to be changed after entry can always be updated later using the Demographics Question Package and the Edit Person screen.

5. Click the **Save** button to create the record and return to the CIRTS main screen.

CHANGING PATIENT INFORMATION

The role of Provider Site user does not have system permissions to change, add, or delete patient information such as Name, Birth Date, Gender, etc. after the patient record has been created. The only patient information that a Provider Site user can change is the address information. Please contact the DPH Administrator for changes to any other patient information data.

To change patient address information:

1. Click the **Immunization Data** tab in the Patient Information section to display the Question Packages table.

2. Double-click the **Demographics** Question Package.

The Demographics Question Package will display.

3. Enter the new address information in the **Responsible Care Giver(s) Information** section of the Question package.

In order to change the address and phone information of the child, the address and phone information must be changed here in the Responsible Care Giver(s) Information section. Please make sure you select the Current Responsible Care Giver

4. Click the **Save** button.

Responsible Care Giver(s) Information			
Care Giver Type ⊟	Mother ▾ Add New		
First Name	Jane	Middle Name	
Last Name	Testkid	Maiden Name	Doe
Date of Birth (mm/dd/yyyy)	01/01/1980	Street address *	5 Another Street
City *	Hartford	State *	CT ▾
Zip code *	06003	Home Phone	(860) 456-7890
Work Phone		Cell Phone	
Email			

* Indicates required field

[Save] [Cancel]

The new address information will now display in the Client Info tab table.

Patient Information

Immunizations Data	Concerns	Client Info	Tasks	Case History

Client Info

NAME	GENDER	BIRTH DATE(MM/DD/YYYY)	ADDRESS	STATUS
Harry Carey	Male	01/01/2006	5 Another Street, Hartford, CT 06003	Active

Chapter 6: Concerns

O V E R V I E W

Purpose

Describe system-generated and manually created concerns.

Objectives

- View Concerns

- Update Concerns

- Manually create Concerns

CONCERNS

A Concern is a free text note that anyone can enter in a patient record to indicate a potential issue that may need to be addressed. Concerns may be manually created and modified by the user; they cannot be deleted and the concern history can always be viewed with the record. Concerns are located in the Patient Information section of the Immunization record.

Patient Information

Immunizations Data	Concerns	Client Info	Tasks	Case History

Concerns

CONCERN	DESCRIPTION	CLIENT	LAST UPDATE	SEVERITY	STATUS
Refusing Hep B	Refusing Hep B	Harry Carey	02/18/2012	Very High	Active
Delaying MMR	Delaying MMR	Harry Carey	02/18/2012	Very High	Active

[Add Concern] [Update Concern]

Concern - Details

Concern:	Refusing Hep B
Description:	Refusing Hep B
Client:	Harry Carey
Status:	Active
Severity:	Very High
Create Date:	02/18/2012
Last Update:	02/18/2012
Updated By:	sbsite
Notes:	Family is refusing to give child Hep B vaccination

Some examples of concerns that might be added to a record are:

- Refusing Hep B

- Requested an alternate schedule – delaying MMR

- Administered MMR early due to travel abroad- will need to administer 2nd MMR

- Patient in China for the summer

To add a concern

1. Click the **Add Concern** button at the bottom of the Concerns table.

The Add Concern screen will display.

The fields in the Add Concern screen are:

Description	Describes the concern
Client	The full name of the client
Severity	Indicates the severity of the concern: Very Low, Low, Medium, High, Very High
Status	Indicates the status of the concern: Active or Resolved
Notes	Displays any notes regarding the concern

2. Enter the **Description**, **Severity**, and any related **Notes**.

3. Click the **Save** button.

Add Concern - Harry Carey - Immunization Record

Concern Information

Description:	Delaying MMR
Client:	Harry Carey ▼
Severity:	Very High ▼
Status:	Active ▼
Notes:	Requested an alternate schedule – delaying MMR

Save   Cancel

4. The concern will be applied and the system will return to the CIRTS main screen with the concern displayed in the Patient Information section.

Patient Information

Immunizations Data	Concerns	Client Info	Tasks	Case History

Concerns

CONCERN	DESCRIPTION	CLIENT	LAST UPDATE	SEVERITY	STATUS
Delaying MMR	Delaying MMR	Harry Carey	02/18/2012	Very High	Active

Add Concern   Update Concern

Concern - Details

Concern:	Delaying MMR
Description:	Delaying MMR
Client:	Harry Carey
Status:	Active
Severity:	Very High
Create Date:	02/18/2012
Last Update:	02/18/2012
Updated By:	sbsite
Notes:	Requested an alternate schedule – delaying MMR

If a concern is assigned a Severity of "Very High", the concern will be displayed in red text in the Summary Information section of the immunization record.

Immunization Record

Summary Information	
CIRTS ID:	100084353 Deduplication Status: Pending
Record Type:	Immunization Record
Client:	Harry Carey Birth Date(mm/dd/yyyy): 01/01/2006 (6 y 1 m Male) Phone: (860) 456-7890
Case Status:	Open
Immunization Summary, Forecast & Schedules:	**Delaying MMR** **Refusing Hep B**

Summary and Forecast: Immunization Summary Immunization Forecast Immunization Certificate

CDC Schedules : 0-6 yrs Schedule 7-18 yrs Schedule Catch-up Schedule Simplified Schedule Adult Immunization

Overdue Vaccines: DTP/aP, HepA, HepB, Influenza, MMR, Polio, Varicella

Vaccines Due: MCV

Enrolled in CIRTS: Yes

VFC Status/Insurance: Unknown / Privately Insured : N/A

Edit Case Properties

To modify a concern

1. Click the Concerns tab.

2. Select a concern by clicking it in the Concerns table.

Patient Information

| Immunizations Data | Concerns | Client Info | Tasks | Case History | |

Concerns					
CONCERN	DESCRIPTION	CLIENT	LAST UPDATE	SEVERITY	STATUS
Refusing Hep B	Refusing Hep B	Harry Carey	02/18/2012	Very High	Active
Delaying MMR	Delaying MMR	Harry Carey	02/18/2012	Very High	Active

Add Concern   Update Concern

3. Click the **Update Concern** button.

The Edit Concern – Immunization Record screen will display.

4. Update the appropriate information for **Severity**, **Status**, and **Notes**.

5. Click the **Save** button to complete the process.

Note: Even if the Status of a concern has been changed to "Resolved", the concern history will still display in the Concerns table of Patient Information; concerns cannot be deleted.

Chapter 7: Question Packages – General Operating Procedures

OVERVIEW

Purpose

Describe the purpose and general operating procedures for all the predefined CIRTS Question Packages

Objectives

- Define Question Packages

- Describe fields in the Question Package table

- Explain how to view individual Question Packages

- Discuss required fields and notifications

QUESTION PACKAGES

A Question Package is a set of information (questions) that should be filled out for each record. They include critical information about the client. CIRTS has nine Question Packages:

- Medical Home
- Demographics
- CIRTS Consent
- Clinical Comments
- Immunization Detailed History
- Immunization Administration – Current Provider
- Immunization Administration – Historical Provider
- Insurance
- Electronic Birth Certificate Download

The Question Packages are displayed in the Immunization Data section of Patient Information.

The fields in the Question Package table are:

Question Package	Identifies the title of the question package
Client	Will always be "Immunization record"
Last Update	Displays the date that each question package was last updated
Updated By	Identifies the user that made the last update or modification to the question package

CIRTS

Chapter 7: Question Packages – General Operating Procedures

To view a Question Package:

1. Open a CIRTS record (immunization record).

2. The Question Packages should already be displayed. If they are not displayed, click the **Immunization Data** tab in the Patient Information section.

3. To view the entire question package, either **double-click** the question package name in the Question Packages table

<div align="center">or</div>

Click the question package name in the Question Packages table and then click the **View Question Package** button.

The selected Question Package will display.

Required questions are indicated by an asterisk ("*"); Question Packages will still be saved with unanswered "required" questions.

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4. After viewing and editing the questions in the question package, click the **Save** button to save the changes and return to the CIRTS main screen

or

Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

It is recommended that users save frequently. CIRTS will time out after twenty minutes of inactivity. If the user receives a phone call, for example, the user should save the question package before taking the call. If the user does not click the Save button and the product does time out, the data that has been entered since the last save will be lost.

The user is advised to open each question package and answer as many questions as possible within that package until each question package has been completed.

Remember: CIRTS is "context-sensitive", the questions in a package will change according to the selections and answers to other questions in the package. For example, when the Demographics package is first displayed, the Care Giver Type field is blank.

When a Care Giver Type is selected, the fields for Care Giver Name, Date of Birth, Address, etc. will appear.

Fields that are grayed-out cannot be changed from within the Question Package. They must be either changed in other screens in the CIRTS or will be calculated by the system based on the data entered in related fields.

For example, in the Responsible Care Giver Information section, the field for Maiden Name of the care giver (if Care Giver Type is "Mother") is grayed out. It cannot be changed by a Provider Site user after the immunization record is created; only DPH can change this field.

Chapter 8: Medical Home Question Package

OVERVIEW

Purpose

Describe the Medical Home Question Package.

Objectives

- View the Medical Home Question Package

- Define the fields in the Medical Home Question Package

- Change a Facility in the Question Package

MEDICAL HOME QUESTION PACKAGE

The Medical Home Question Package is a set of information (questions) relating to the Client including:

- Facility (Medical Home)

- Medical Record Number

- Patient Status

To view the Medical Home Question Package:

1. Search for and open a Client record.

2. Either **double-click** Medical Home in the Question Package table, or click once on Medical Home in the Question Package table and then click the **View Question Package** button.

Patient Information				
Immunizations Data	Concerns	Client Info	Tasks	Case History

Question Packages			
QUESTION PACKAGE	CLIENT	LAST UPDATE	UPDATED BY
01. Medical Home	Immunization Record	01/29/2012	sbsite
02. Demographics	Immunization Record	02/18/2012	sbsite
03. CIRTS Consent	Immunization Record	01/29/2012	sbsite
04. Clinical Comments	Immunization Record	01/29/2012	sbsite
05. Immunization Detailed History	Immunization Record	01/29/2012	sbsite
06. Immunization Administration - Current Provider	Immunization Record	01/29/2012	sbsite
07. Immunization Administration - Historical Provider	Immunization Record	01/29/2012	sbsite
08. Insurance	Immunization Record	01/29/2012	sbsite
09. Electronic Birth Certificate Download	Immunization Record	01/29/2012	sbsite

View Question Package

The Medical Home Question Package will display.

The data fields in the Medical Home Question Package are:

Child Demographic Information section	
Facility	The medical facility that is currently servicing the client: initially pre-filled with the name of the Provider Site that either created the immunization record or that was reported to CIRTS on the CIRTS enrollment form
Medical Record Number	Client's Medical Record Number assigned by the provider facility: alpha-numeric free text field
Patient Status	Status of the client: Active, Deceased, Moved out of State
Outreach Status	Outreach status of the client: 1. Invalid EVRS Info (DPH Use Only), 2. Patient Unknown, 3. Lost to Follow-Up, 4. Transferred to Unknown

Required questions are indicated by an asterisk ("*"); Question Packages will still be saved with unanswered "required" questions. There are no required questions in the Medical Home Question Package.

3. Answer as many questions as possible.

4. After answering the questions, click the **Save** button to save changes and return to the CIRTS main screen. Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

Entering the Patient Status:

If "Deceased" is selected for the Patient Status field, the section changes to display a new field for the Date of Death.
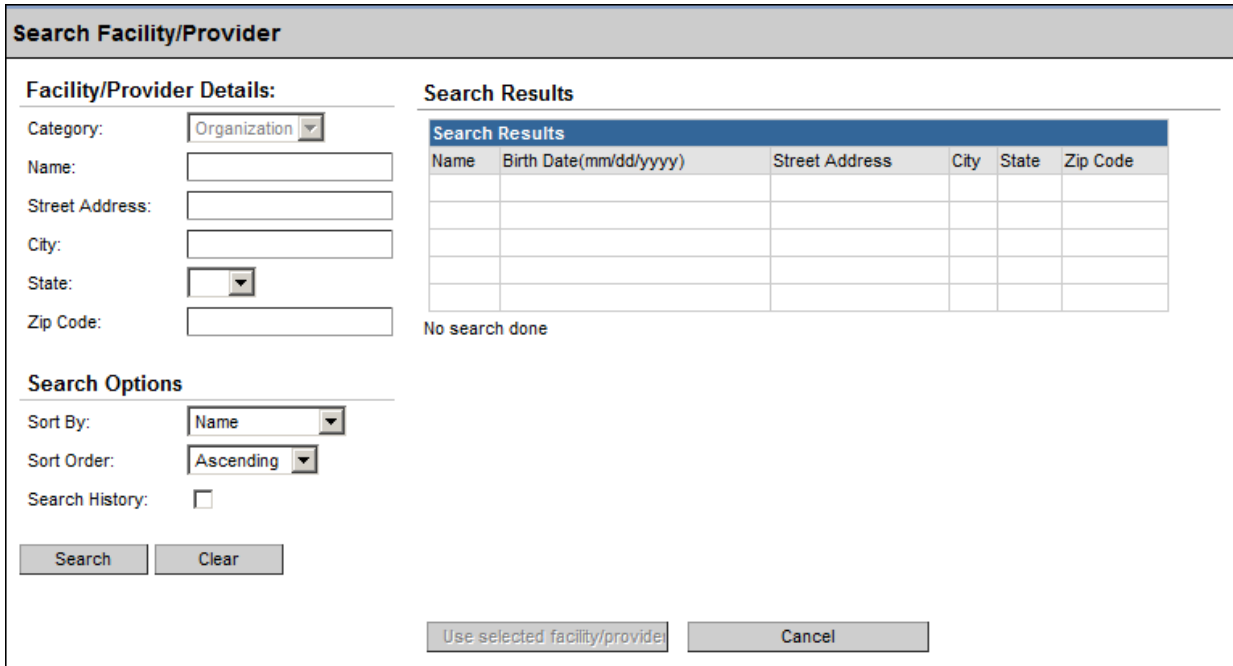
Modifying Facility Information:

The Facility field is initially pre-filled with the name of the Provider Site that either created the immunization record or that was reported to CIRTS on the CIRTS enrollment form. To change the Facility, it is necessary to perform a search; the Facility cannot be typed directly into the field.

1. Click the **Search** button to the right of the Facility link.

Facility	MAGIC CARPET PEDI
Patient Status	Active

The Search Facility/Provider dialog box will display.

Search Facility/Provider

Facility/Provider Details:

Category:	Organization
Name:	
Street Address:	
City:	
State:	
Zip Code:	

Search Results

Name	Birth Date(mm/dd/yyyy)	Street Address	City	State	Zip Code

No search done

Search Options

Sort By:	Name
Sort Order:	Ascending
Search History:	☐

Search   Clear

Use selected facility/provider   Cancel

2. Enter the name of the Facility in the **Name** field.

⚠️ If you are not sure of the spelling or of how the facility is listed in CIRTS, use an asterisk (*) to perform a wildcard search.

3. Enter any other Search criteria as necessary.

4. Click the **Search** button.

   The Search Results will display.

5. **Click** the name of the Facility in the Search results list to select it.

6. Click the **Use selected facility/provider** button.

    The selected Facility will be displayed in the Facility field.

Deleting Facility Information:

If the current Facility is unknown, the Facility data can be deleted.

1. Click the **Clear** button (the Trashcan icon) to the right of the Facility link.

    The Facility link will be removed and the words "Not answered" will appear in its place.

Facility	Not answered	
Patient Status	Active	

Viewing Facility Information:

To view additional information about the Facility:

1. Click the **View Summary** button to the right of the Facility link.

Facility	Test Facility	
Patient Status	Active	View Summary

The Client/Facility Summary screen will display.
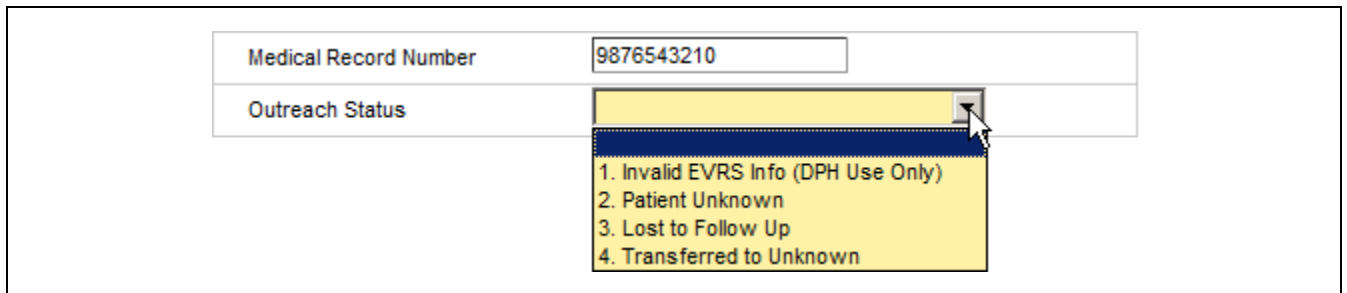
Client/Facility Summary

Client/Facility Summary	
Name:	Test Facility
Create Date:	12/06/2011
Notes:	

Address History

Type	Dates	Address	Phone
	01/01/1900 - 01/01/2030	123 Jefferson St, Hartford, CT 06134	(H) (111) 111-1111

Patients

CIRTS ID	Client	Status	Create Date	Record Type	City	Mothers Maiden Name
100007278	Test Facility	Open	12/06/2011	Facility	OPEN	OFFLINE

Close

2. Click the **Close** button at the bottom of the screen to return to the Medical Home Question package.

Updating the Outreach Status:
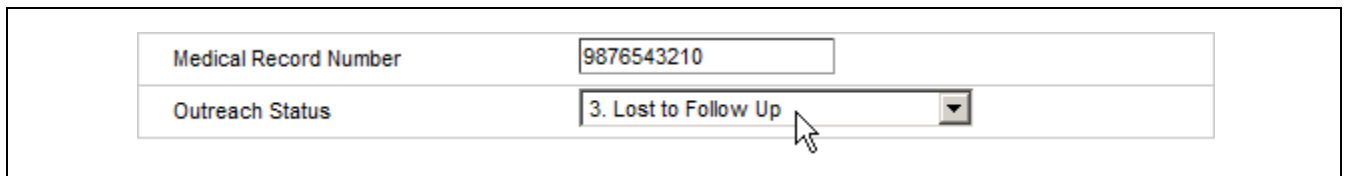
To update a child's Outreach Status:

1. Click the **Outreach Status** list button to display the status options.

| Medical Record Number | 9876543210 |
| Outreach Status | |

1. Invalid EVRS Info (DPH Use Only)
2. Patient Unknown
3. Lost to Follow Up
4. Transferred to Unknown

2. Select either Patient Unknown, Lost to Follow Up, or Transferred to Unknown from the list. This will send the child's record to a DPH Outreach Workflow.

| Medical Record Number | 9876543210 |
| Outreach Status | 3. Lost to Follow Up |

Chapter 9: CIRTS Demographics Question Package

O V E R V I E W

Purpose

Describe the CIRTS Demographics Question Package.

Objectives

- View the CIRTS Demographics Question Package

- Define the fields in the CIRTS Demographics Question Package

- Enter information in the CIRTS Demographics Question Package

CIRTS DEMOGRAPHICS QUESTION PACKAGE

The Demographics Question Package is a set of information (questions) relating to the Client including:

- Demographics information

- Responsible Care Giver information

To view the Demographics Question Package:

1. Search for and open a Client record.

2. Either **double-click** Demographics in the Question Package table, or click once on Demographics in the Question Package table and then click the **View Question Package** button.

Patient Information				
Immunizations Data	Concerns	Client Info	Tasks	Case History

Question Packages

QUESTION PACKAGE	CLIENT	LAST UPDATE	UPDATED BY
01. Medical Home	Immunization Record	02/19/2012	sbsite
02. Demographics	Immunization Record	02/19/2012	sbsite
03. CIRTS Consent	Immunization Record	02/19/2012	sbsite
04. Clinical Comments	Immunization Record	02/19/2012	sbsite
05. Immunization Detailed History	Immunization Record	02/19/2012	sbsite
06. Immunization Administration - Current Provider	Immunization Record	02/19/2012	sbsite
07. Immunization Administration - Historical Provider	Immunization Record	02/19/2012	sbsite
08. Insurance	Immunization Record	02/19/2012	sbsite
09. Electronic Birth Certificate Download	Immunization Record	02/19/2012	sbsite

View Question Package

The Demographics Question Package will display.

02. Demographics Package , Harry Carey - Immunization Record

Birth Date(mm/dd/yyyy): 01/01/2006 **Age :** 6 Yr 1 Mo **Gender:** Male **VFC Status:** Unknown **Insurance:**
Address: 10 Test Street, Hartford, CT 06002

The data fields in the Demographics Question Package are:

Demographic section	
Address (Home)	Address information of the child: Pre-filled from Add New Patient screen
Street	Street Address of child: Pre-filled from Add New Patient screen
City	City of child: Pre-filled from Add New Patient screen
State	State of child: Pre-filled from Add New Patient screen
Zip code	Zip Code of child: Pre-filled from Add New Patient screen
Email	Email of child: Pre-filled from Add New Patient screen

Home Phone	Home Telephone of child: Pre-filled from Add New Patient screen
Work Phone	Work Telephone of child: Pre-filled from Add New Patient screen
Cell Phone	Mobile Phone of child: Pre-filled from Add New Patient screen
Birth Date	Birth Date of child: Pre-filled from Add New Patient screen
Gender	Gender of child: Pre-filled from Add New Patient screen – Male, Female, Transgender
Race	Race of child: American Indian/Alaskan Native, Asian, Black/African American, Native Hawaiian/Pacific Islander, Other, Unknown, White/Caucasian
Ethnicity	Ethnicity of child: Hispanic or Latino, Unknown, not Hispanic or Latino
Birth Country	Birth Country of child
Birth State	Birth State of child
Language	Language of child
VFC Date Screened (mm/dd/yyyy)	Date of VFC Screening
VFC Eligibility	1. Insured, 2. Husky B, 3. Under-insured, 4. Husky A, 5. Native American/Alaskan Native, 6. No Health Insurance
VFC Status	VFC Status of child: VFC-Eligible, VFC-Ineligible
Enrolled in CIRTS	CIRTS Enrollment Status of child: Yes, No
Current Responsible Care Giver Type section	
Current Responsible Care Giver	Child's Current Responsible Care Giver Type: Father, Guardian, Mother, Non-household Contact, Self
Responsible Care Giver(s) Information section	
Care Giver Type	Child's Current Responsible Care Giver Type: Father, Guardian, Mother, Non-household Contact, Self
First Name	First Name of child's Responsible Care Giver
Middle Name	Middle Initial of child's Responsible Care Giver

Last Name	Last Name of child's Responsible Care Giver
Date of Birth (mm/dd/yyyy)	Date of Birth of child's Responsible Care Giver
Street address	Street Address of child's Responsible Care Giver
City	City of child's Responsible Care Giver
State	State of child's Responsible Care Giver
Zip code	Zip Code of child's Responsible Care Giver
Home Phone	Home Telephone number of child's Responsible Care Giver - enter "(999) 999-9999" if unknown
Work Phone	Work Telephone of child's Responsible Care Giver
Cell Phone	Mobile Phone of child's Responsible Care Giver
Email	Email address of child's Responsible Care Giver

Required questions are indicated by an asterisk ("*"); Question Packages will still be saved with unanswered "required" questions.

3. Answer as many questions as possible.

4. After answering the questions, click the **Save** button to save changes and return to the CIRTS main screen. Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

.
Reminder: To delete any item that has been selected from any list in the Question Package, scroll to the top of the list and select the "empty" item.

Entering Responsible Care Giver(s) Information:

If a Care Giver Type has not been selected in the Responsible Care Giver(s) Information section, no additional fields will be displayed; additional fields will appear after a selection is made from the list.

1. Select a **Care Giver Type** from the dropdown list.

The additional fields will appear in the Responsible Care Giver(s) Information section.

2. Enter the appropriate Care Giver information.

Entering Multiple Responsible Care Giver(s) Information:

If the patient has multiple Responsible Care Givers:

1. Click the **Add New** link to the right of the Care Giver Type field.

An additional Care Giver Type field will appear below the previous Responsible Care Giver(s) Information.

Chapter 10: CIRTS Consent Question Package

O V E R V I E W

Purpose

Describe the CIRTS Consent Screening Question Package.

Objectives

- View the CIRTS Consent Question Package

- Define the fields in the CIRTS Consent Question Package

- Enter Information in the CIRTS Consent Question Package

CIRTS CONSENT QUESTION PACKAGE

The Consent Question Package is a set of information (questions) relating to the Client including:

- CIRTS Consent History

- Declaration

⚠ Children can opt in and opt out of CIRTS at any time. Please contact the DPH Administrator to change the CIRTS consent status

To view the Consent Question Package:

1. Search for and open a Client record.

2. Either **double-click** CIRTS Consent in the Question Package table, or click once on CIRTS Consent in the Question Package table and then click the **View Question Package** button.

The CIRTS Consent Question Package will display.

The data fields in the CIRTS Consent Question Package are:

CIRTS Consent History section	
Enrolled in CIRTS	Is child enrolled in CIRTS: Yes, No – can only be entered by DPH Staff
Effective Date (mm/dd/yyyy)	Effective Date of child's enrollment in CIRTS - can only be entered by DPH Staff
Declaration section	
CIRTS Enrollment Form in English	A link that displays a CIRTS enrollment form in English
CIRTS Enrollment Form in English	A link that displays a CIRTS enrollment form in Spanish

Required questions are indicated by an asterisk ("*"); Question Packages will still be saved with unanswered "required" questions. There are no required questions in the CIRTS Consent Question Package.

3. Answer as many questions as possible.

4. After answering the questions, click the **Save** button to save changes and return to the CIRTS main screen. Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

<u>**To view the CIRTS Enrollment Form:**</u>

1. Click either the **CIRTS Enrollment Form in English** or the **CIRTS Enrollment Form in Spanish** link at the bottom of the Declaration section.

The selected CIRTS Enrollment Form will open in a new window.

2. Click the **Print** icon in your browser to print the form.

Chapter 11: Clinical Comments Question Package

OVERVIEW

Purpose

Describe the Clinical Comments Question Package.

Objectives

- View the Clinical Comments Question Package

- Define the fields in the Clinical Comments Question Package

- Enter information in the Clinical Comments Question Package

CLINICAL COMMENTS QUESTION PACKAGE

The Clinical Comments Question Package is a set of information (questions) relating to the Client including:

- Refusals

- Allergies

- Contraindications

Clinical Comments will display on the Immunization Certificate and will impact the Immunization Forecast. For example: if there is a reaction to a particular vaccine, the vaccine will not display as due or overdue in the Forecast. The following Immunization Forecast illustrates that Varicella is not on the recommended schedule because of a contraindication that was entered in the Clinical Comments.

<div style="border:1px solid #000; padding:10px">

Immunization Forecast - Winnie Pooh

Birth Date(mm/dd/yyyy): 10/24/2010　　Age: 1 y 5 m　　Gender: Male
Overdue Vaccines: **PCV**　Vaccines Due:**HepA, MCV, MMR**
Report Date: Mar 28 2012 10:2:52 AM

Recommended Schedule

Group Name	Earliest Date	Recommended Date	Overdue Date	Latest Date	Comment
DTP/aP	10/24/2014	10/24/2014	10/24/2015	10/23/2017	
PCV	04/27/2011	04/27/2011	05/27/2011	10/23/2015	
Polio	10/24/2014	10/24/2014	10/24/2015	10/23/2028	
Influenza	08/01/2012	08/01/2012	09/01/2012	10/24/2130	
MMR	12/08/2011	10/24/2014	10/24/2015	10/24/2130	
Varicella					[Contraindication: Clinician-certified history of varicella (chickenpox)
HepA	10/24/2011	10/24/2011	05/24/2012	10/23/2029	
MCV	07/24/2011	10/24/2021	10/24/2022	10/23/2030	
HPV	10/24/2019	10/24/2021	10/24/2023	10/23/2032	
Pneumo-Poly	10/24/2075	10/24/2075	11/24/2075	10/24/2130	
Tdap	10/24/2017	10/24/2017	10/24/2022	10/24/2130	
Zoster	10/24/2070	10/24/2070	10/24/2071	10/24/2130	

Forecasting may not be accurate for series that diverge substantially from the recommended schedule. Please use clinical judgement when interpreting data and recommendations.

</div>

To view the Clinical Comments Question Package:

1. Search for and open a Client record.

2. Either **double-click** Clinical Comments in the Question Package table, or click once on Clinical Comments in the Question Package table and then click the **View Question Package** button.

The Clinical Comments Question Package will display.

The data fields in the Clinical Comments Question Package are:

Active Clinical Comments section	
Category	Category of the Active Clinical Comment: Contraindications – Allergy Previous Dose, Contraindications – Allergy Vaccine Component, Contraindications – Risk factor, Contraindications – Unspecified, Immunities, Precautions, Refusals, Religious Exemptions, Special Indications
Inactive Clinical Comments section	
Category	Category of the Inactive Clinical Comment: Contraindications – Allergy Previous Dose, Contraindications – Allergy Vaccine Component, Contraindications – Risk factor, Contraindications – Unspecified, Immunities, Precautions, Refusals, Religious Exemptions, Special Indications

Required questions are indicated by an asterisk ("*"); Question Packages will still be saved with unanswered "required" questions. There are no required questions in the Clinical Comments Question Package.

3. Answer as many questions as possible.

4. After answering the questions, click the **Save** button to save changes and return to the CIRTS main screen. Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

.

Reminder: To delete any item that has been selected from any list in the Question Package, scroll to the top of the list and select the "empty" item.

Entering Clinical Comments:

If a Clinical Comments Category has not been selected in either the Active Clinical Comments section or the Inactive Clinical Comments section, no additional fields will be displayed; additional fields will appear after a selection is made from one of the lists.

1. Select a **Category** from the dropdown list.

The additional fields will appear in the Active or Inactive Clinical Comments section. The additional field type will vary based on the selected Category. For example, If "Contraindications – Allergy Previous Dose" was selected, the new field displayed is "Contraindications". If "Refusal" was selected, the new field displayed is "Refusal".

2. Select the appropriate Category information from the new list.

Based on the selection, even more additional fields will appear in the Active or Inactive Clinical Comments section. For example, if "allergy (anaphylactic) to previous dose of Measles)" was selected, new fields are displayed for "Applied Date" and "End Date".

3. Enter the appropriate information in the new fields.

Entering Multiple Clinical Comments:

If the immunization record has multiple Clinical Comments:

1. Click the **Add New** link to the right of the Category field.

An additional Category field will appear below the previous Category Information.
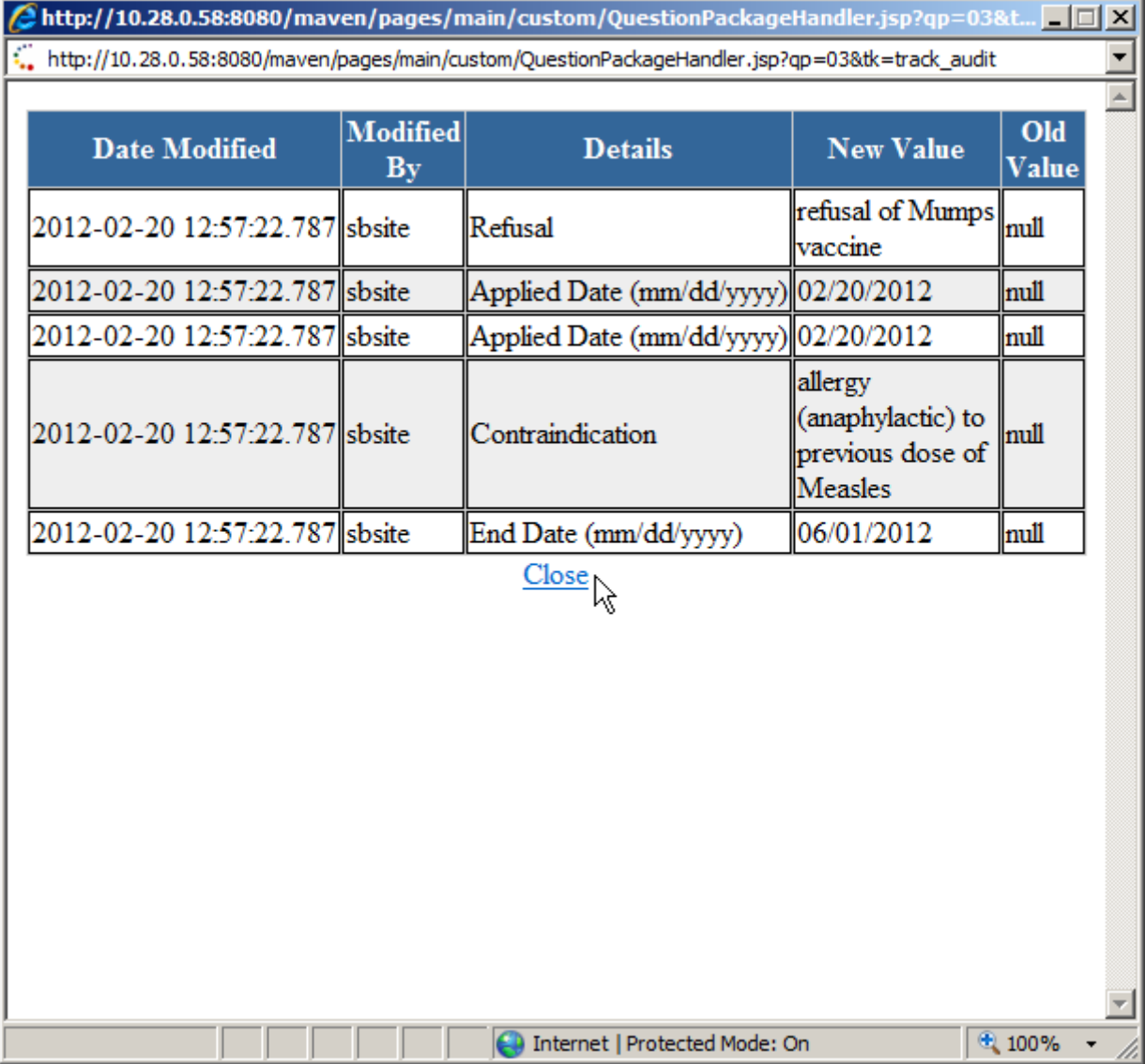
Audit Review of Clinical Comments:

For a list of the Clinical Comments history:

1. Click the **Click Here for Audit Review** link at the top of the Question Package.

An Audit Review report will display in a new window.

2. Click the **Close** link to close the Audit Review window and return to the Clinical Comments Question Package.

Chapter 12: Immunization Detailed History Question Package

O V E R V I E W

Purpose

Describe the Immunization Detailed History Question Package.

Objectives

- View the Immunization Detailed History Question Package

- Define the fields in the Immunization Detailed History Question Package

- Enter information in the Immunization Detailed History Question Package

IMMUNIZATION DETAILED HISTORY QUESTION PACKAGE

The Immunization Detailed History Question Package is a set of information (questions) relating to the Client including:

- Client's history of vaccinations

To view the Immunization Detailed History Question Package:

1. Search for and open a Client record.

2. Either **double-click** Immunization Detailed History in the Question Package table, or click once on Immunization Detailed History in the Question Package table and then click the **View Question Package** button.

Patient Information							
Immunizations Data	Concerns	Client Info	Tasks	Case History			

Question Packages			
QUESTION PACKAGE	CLIENT	LAST UPDATE	UPDATED BY
01. Medical Home	Immunization Record	02/19/2012	sbsite
02. Demographics	Immunization Record	02/19/2012	sbsite
03. CIRTS Consent	Immunization Record	02/19/2012	sbsite
04. Clinical Comments	Immunization Record	02/19/2012	sbsite
05. Immunization Detailed History	Immunization Record	02/19/2012	sbsite
06. Immunization Administration - Current Provider	Immunization Record	02/19/2012	sbsite
07. Immunization Administration - Historical Provider	Immunization Record	02/19/2012	sbsite
08. Insurance	Immunization Record	02/19/2012	sbsite
09. Electronic Birth Certificate Download	Immunization Record	02/19/2012	sbsite

View Question Package

The Immunization Detailed History Question Package will display.

If no immunization information has been entered in either the Immunization Administration – Current Provider Question Package or the Immunization Administration – Historical Provider Question Package, the Immunization Detailed History Question Package will display a message stating that "There is no immunization detail history available for the client".

After data is entered in either the Immunization Administration – Current Provider Question Package or the Immunization Administration – Historical Provider Question Package, the data is moved to the Immunization Detailed History Question Package and will no longer appear in the Immunization Administration – Current Provider Question Package or the Immunization Administration – Current Provider Question Package.

The data fields in the Immunization Detailed History Question Package are:

Vaccine Information section	
* Vaccine Group	*Required field – vaccine group name
** Vaccine	**Required field – vaccine name
Trade Name	Vaccine trade name
** Date Given	**Required field – date vaccine was administered to the patient

Historical Shot	This field is checked when the vaccine was entered under the Immunization Administration – Historical Provider Question Package
Manufacturer	Vaccine manufacturer
Lot Number	Vaccine lot number – free text field
Date Reported	Date the vaccine was imported or data was entered into the registry – automatically populated by CIRTS
Dose	Amount of the vaccine administered
Incomplete Dose	Incomplete vaccine dose: Yes or No
Route	Route of vaccine administration: Intramuscular, Subcutaneous, Multiple Puncture, Oral, Intradermal
Site	Site of vaccine administration: Left Arm, Left Gluteus, Left Leg, Right Arm, Right Gluteus, Right Leg, Other
VIS Given	Date the Vaccine Information Statement (VIS) was given to the patient
VIS Publication Date	Date the Vaccine Information Statement (VIS) was published – drop down list
Data Entered By	The Name of the CIRTS user who entered the vaccine data in CIRTS
Vaccine Administered By	The provider who administered the vaccine – free text field
Admin Facility	Medical home facility
VFC Status	The patient's Vaccines for Children (VFC) eligibility status
Is State Supplied?	State supplied vaccine: Yes or No
Expired Lot Administered?	Vaccine with an expired lot number administered: Yes or No
Dose Validity per Forecasting	Dose validity determined by the Forecasting: Valid or Invalid
Delete shot record due to data entry error	Click to delete a shot record due to a data entry error (this will only delete the shot and not the patient record.)

Required questions are indicated by an asterisk ("*"). Required questions in order to **save** are indicated by a double asterisk ("**"). The required fields in the Immunization Detailed History Question package are:

- Vaccine Group
- Vaccine Name
- Date Given

The Immunization Detailed History Question Package *will not be saved with unanswered "required" questions*.

3. Answer as many questions as possible.

4. After answering the questions, click the **Save** button to save changes and return to the CIRTS main screen. Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

.
Reminder: To delete any item that has been selected from any list in the Question Package, scroll to the top of the list and select the "empty" item.

Chapter 13: Immunization Administration – Current Provider Question Package

OVERVIEW

Purpose

Describe the Immunization Administration – Current Provider Question Package.

Objectives

- View the Immunization Administration – Current Provider Question Package

- Define the fields in the Immunization Administration – Current Provider Question Package

- Enter information in the Immunization Administration – Current Provider Question Package

IMMUNIZATION ADMINISTRATION – CURRENT PROVIDER QUESTION PACKAGE

The Immunization Administration – Current Provider Question Package is a set of information (questions) relating to the Client including:

- Immunization Summary information

- Current provider vaccine information

After data is entered in the Immunization Administration – Current Provider Question Package, the data is moved to the Immunization Detailed History Question Package and will no longer appear in the Immunization Administration – Current Provider Question Package.

To view the Immunization Administration – Current Provider Question Package:

1. Search for and open a Client record.

2. Either **double-click** Immunization Administration – Current Provider in the Question Package table, or click once on Immunization Administration – Current Provider in the Question Package table and then click the **View Question Package** button.

The Immunization Administration – Current Provider Question Package will display.

Selecting from the Vaccine Group list will display the fields for the selected vaccine.

The data fields in the Immunization Administration – Current Provider Question Package are:

Current Vaccine Information section	
* Vaccine Group	*Required field – vaccine group name
** Vaccine	**Required field – vaccine name
Trade Name	Vaccine trade name
Lot Number	Vaccine lot number – free text field
** Date Given	**Required field – date vaccine was administered to the patient
Manufacturer	Vaccine manufacturer
Incomplete Dose	Incomplete vaccine dose: Yes or No
Dose	Amount of the vaccine administered
Is State Supplied?	State supplied vaccine: Yes or No
Date Entered By	The Name of the CIRTS user who entered the vaccine data in CIRTS
Admin Facility	Medical home facility
VIS Given	Date the Vaccine Information Statement (VIS) was given to the patient
VIS Publication Date	Date the Vaccine Information Statement (VIS) was published – drop down list
Vaccine Administered By	The provider who administered the vaccine – free text field

Required questions are indicated by an asterisk ("*"). Required questions in order to **save** are indicated by a double asterisk ("**"). The required fields in the Immunization Administration – Current Provider Question package are:

- Vaccine Group
- Vaccine Name
- Date Given

The Immunization Administration – Current Provider Question Package *will not be saved with unanswered "required" questions*.

3. Answer as many questions as possible.

4. After answering the questions, click the **Save** button to save changes and return to the CIRTS main screen. Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

Reminder: To delete any item that has been selected from any list in the Question Package, scroll to the top of the list and select the "empty" item.

Entering Admin Facility Information:

The Admin Facility defaults to the facility selected in the Medical Home Question Package. To enter a different Admin Facility, it is necessary to perform a search; the Admin Facility cannot be typed directly into the field.

1. Click the **Search** button to the right of the Admin Facility field.

The Search Facility/Provider dialog box will display.

2. Enter the name of the Admin Facility in the **Name** field.

If you are not sure of the spelling or of how the facility is listed in CIRTS, use an asterisk (*) to perform a wildcard search.

3. Enter any other Search criteria as necessary.

4. Click the **Search** button.

The Search Results will display.

5. **Click** the name of the Admin Facility in the Search results list to select it.

6. Click the **Use selected facility/provider** button.

   The selected Facility will be displayed in the Admin Facility field.

If the Admin Facility is unknown or is an "out-of-state" facility, enter "Other Site"; do not leave this field unanswered or "empty".

Deleting Admin Facility Information:

If the current Admin Facility is unknown, the Facility data can be deleted.

1. Click the **Clear** button (the Trashcan icon) to the right of the Admin Facility link.

The current Admin Facility will be removed and will be replaced by the default facility in the Medical Home Question Package.

Viewing Admin Facility Information:

To view additional information about the Admin Facility:

1. Click the **View Summary** button to the right of the Admin Facility link.

The Client/Facility Summary screen will display.

2. Click the **Close** button at the bottom of the screen to return to the Immunization Administration – Current Provider Question package.

Entering Multiple Vaccines:

If the immunization record has multiple vaccines:

1. Click the **Add New** link to the right of the Vaccine Group field.

.
You can also click on one of the vaccine links in the Recommended Groups section.

An additional Vaccine Group field will appear below the previous Vaccine information.

Chapter 14: Immunization Administration – Historical Provider Question Package

OVERVIEW

Purpose

Describe the Immunization Administration – Historical Provider Question Package.

Objectives

- View the Immunization Administration – Historical Provider Question Package

- Define the fields in the Immunization Administration – Historical Provider Question Package

- Enter information in the Immunization Administration – Historical Provider Question Package

IMMUNIZATION ADMINISTRATION – HISTORICAL PROVIDER QUESTION PACKAGE

The Immunization Administration – Historical Provider Question Package is a set of information (questions) relating to the Client including:

- Immunization Summary information

- Historical Vaccine information

After data is entered in the Immunization Administration – Historical Provider Question Package, the data is moved to the Immunization Detailed History Question Package and will no longer appear in the Immunization Administration – Historical Provider Question Package.

To view the Immunization Administration – Historical Provider Question Package:

1. Search for and open a Client record.

2. Either **double-click** Immunization Administration – Historical Provider in the Question Package table, or click once on Immunization Administration – Historical Provider in the Question Package table and then click the **View Question Package** button.

The Immunization Administration – Historical Provider Question Package will display.

The data fields in the Immunization Administration – Historical Provider Question Package are:

Historical Vaccine Information section	
Historical Vaccine Group	**Required field – vaccine group name
Historical vaccine	**Required field – vaccine name
Administration date (mm/dd/yyyy)	**Required field – date vaccine was administered to the patient
Admin Facility	*Facility that administered vaccine to the patient

Required questions are indicated by an asterisk ("*"). Required questions in order to **save** are indicated by a double asterisk ("**"). The required fields in the Immunization Administration – Historical Provider Question package are:

- Historical Vaccine Group
- Historical Vaccine
- Administration Date

The Immunization Administration – Historical Provider Question Package **will not be saved with unanswered "required" questions**.

If the Admin Facility is unknown or is an "out-of-state" facility, enter "Other Site"; do not leave this field unanswered or "empty".

2. After answering the questions, click the **Save** button to save changes and return to the CIRTS main screen. Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

.
Reminder: To delete any item that has been selected from any list in the Question Package, scroll to the top of the list and select the "empty" item.

Entering Admin Facility Information:

To enter the Admin Facility, it is necessary to perform a search; the Admin Facility cannot be typed directly into the field.

1. Click the **Search** button to the right of the Admin Facility section.

The Search Facility/Provider dialog box will display.

2. Enter the name of the Admin Facility in the **Name** field.

If you are not sure of the spelling or of how the facility is listed in CIRTS, use an asterisk (*) to perform a wildcard search. You can also run the Facility Listing Report (Chapter 18) and sort by Town to look up the name of the facility.

3. Enter any other Search criteria as necessary.

3. Click the **Search** button.

The Search Results will display.

4. **Click** the name of the Admin Facility in the Search results list to select it.

5. Click the **Use selected facility/provider** button.

The selected Facility will be displayed in the Admin Facility field.

If the Admin Facility is unknown or is an "out-of-state" facility, enter "Other Site"; do not leave this field unanswered or "empty".

Deleting Admin Facility Information:

If the current Admin Facility is unknown, the Facility data can be deleted.

1. Click the **Clear** button (the Trashcan icon) to the right of the Admin Facility link.

The Admin Facility will be removed and the words "Not answered" will appear in its place.

Viewing Admin Facility Information:

To view additional information about the Admin Facility:

1. Click the **View Summary** button to the right of the Admin Facility link.

The Client/Facility Summary screen will display.

2. Click the **Close** button at the bottom of the screen to return to the Immunization Administration – Historical Provider Question package.

If the Admin Facility is unknown or is an "out-of-state" facility, perform the Facility Search for "Other*" and select "Other Site" from the Search Results list.

Entering Multiple Historical Vaccines:

If the immunization record has multiple historical vaccines:

1. Click the **Add New** link to the right of the Historical Vaccine Group field.

An additional Historical Vaccine Group field will appear below the previous Historical Vaccine information.

Chapter 15: Insurance Question Package

O V E R V I E W

Purpose

Describe the Insurance Question Package.

Objectives

- View the Insurance Question Package

- Define the fields in the Insurance Question Package

- Enter information in the Insurance Question Package

INSURANCE QUESTION PACKAGE

The Insurance Question Package is a set of information (questions) relating to the Client including:

- Private Insurance held on the client

To view the Insurance Question Package:

1. Search for and open a Client record.

2. Either **double-click Insurance** in the Question Package table, or click once on **Insurance** in the Question Package table and then click the **View Question Package** button.

The Insurance Question Package will display.

The data fields in the Insurance Question Package are:

Private Insurance section	
Private Insurer	Drop down list of private health insurance plans

Required questions are indicated by an asterisk ("*"); Question Packages will still be saved with unanswered "required" questions. There are no required questions in the Insurance Question Package.

3. Answer as many questions as possible.

4. After answering the questions, click the **Save** button to save changes and return to the CIRTS main screen. Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

.
Reminder: To delete any item that has been selected from any list in the Question Package, scroll to the top of the list and select the "empty" item.

Chapter 16: Electronic Birth Certificate Download Question Package

OVERVIEW

Purpose

Describe the Electronic Birth Certificate Download Question Package.

Objectives

- View the Electronic Birth Certificate Download Question Package

- Define the fields in the Electronic Birth Certificate Download Question Package

- Enter information in the Electronic Birth Certificate Download Question Package

ELECTRONIC BIRTH CERTIFICATE DOWNLOAD QUESTION PACKAGE

The Electronic Birth Certificate Download Question Package is a set of information (questions) relating to the Client including:

- Birth Hospital of client

- Plurality of Birth

- Birth Order

To view the Electronic Birth Certificate Download Question Package:

1. Search for and open a Client record.

2. Either **double-click** Electronic Birth Certificate Download Question Package in the Question Package table, or click once on Electronic Birth Certificate Download Question Package in the Question Package table and then click the **View Question Package** button.

The Electronic Birth Certificate Download Question Package will display.

09. Electronic Birth Certificate Download Package , Winnie Pooh - Immunization Record

Birth Date(mm/dd/yyyy): 10/24/2010 **Age :** 1 Yr 5 Mo **Gender:** Male **VFC Status:** VFC-Not Eligible **Insurance:** Anthem Blue Cross and Blue Shield
Address: 4 Honeyspot Rd, Hartford, CT 06114

Save   Cancel

| Birth Hospital | HARTFORD HOSPITAL ▼ | | |
| Plurality | ▼ | Birth Order | ▼ |

Save   Cancel

The data fields in the Electronic Birth Certificate Download Question Package are:

Birth Hospital Information section	
Birth Hospital	The hospital where the child was born
Plurality	The plurality of birth
Birth Order	If plural birth, the birth order

Required questions are indicated by an asterisk ("*"); Question Packages will still be saved with unanswered "required" questions. There are no required questions in the Electronic Birth Certificate Download Question Package.

3. Answer as many questions as possible.

4. After answering the questions, click the **Save** button to save changes and return to the CIRTS main screen. Click the **Cancel** button to return to the CIRTS main screen without saving any changes.

Chapter 17: Tasks

O V E R V I E W

Purpose

Explain how and why to use tasks in CIRTS

Objectives

- Explain the importance of tasks

- Demonstrate how to use the Tasks Queue

- View tasks

- Create and edit tasks

T A S K S

A task within CIRTS is a technique for users to delegate assignments or work to other users or groups. Tasks are accessed in several places:

- from the Tasks section of the Splash screen
- from the Tasks icon in the toolbar
- from the Workflow icon in the toolbar
- from the Tasks tab in the Patient Information section.

Task creation can be different depending upon where the user initiated the create task action. If the user clicked the Add Task link from the Workflow Queues page (next to Task Specific Monitors), the task will not automatically be assigned to a specific record but if the user clicks the Tasks tab in the Patient Information section, the task will be associated with the currently active record.

If a task is deleted, it will no longer display in the Tasks list, in the Splash screen, or in the Tasks tab of the Patient Information section. If the task status is changed to "Completed", however, it will still display in all places.

Some examples of tasks that could be attached to an immunization record are:

- Possible duplicate record – please verify
- Child deceased – date of death unknown – please update in system
- Child's correct DOB is …. – please change in system
- Child's name is incorrect - Correct spelling of this child's name is…
- Child's name has changed – please update in system
- Please check the date (year) of the MMR vaccine and Varicella vaccine
- Please enter the shots for this child before they transferred
- Please indicate where this child transferred (if known)
- Please see the error in the forecasting on CIRTS ID#
- Child was listed as "patient unknown", however they had shots administered under your site. Please check for this patient again.
- Please correct the Admin Facility for the vaccines given for this child.
- Please check/correct the date of the PCV vaccine given date

To View Tasks from the Toolbar:

1. Click the **Tasks** button on CIRTS toolbar.
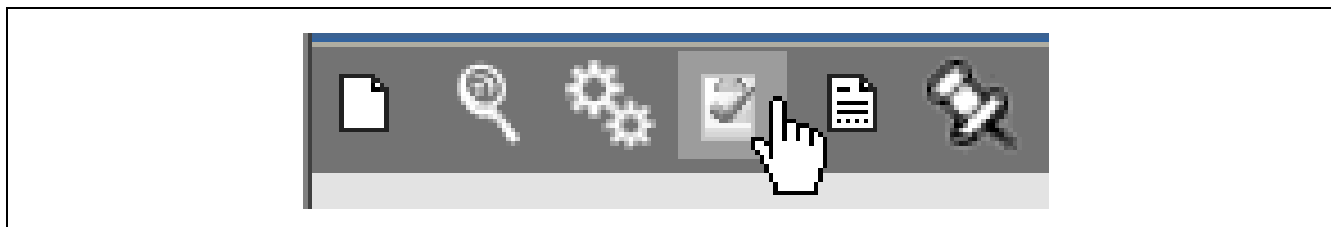
If a record is loaded, tasks for that current record (if any) will be displayed.

All tasks assigned to the current user will also be displayed.

The fields in the Tasks list window are:

Type	Displays the Task type: Assignment
Priority	Indicates the Task priority: Very Low, Low, Medium, High, Very High
Due Date	Displays the date that the Task is scheduled for completion
Description	Briefly describes the task to be accomplished
Status	The status of the task in the queue: Pending, In Progress, Completed
Created By	Displays the name of the user who created the record and date record was created
Immunization Record	Displays the unique record number automatically assigned by CIRTS and the name of the client
Assigned To	Identifies the user responsible for updating the Task

Assigned To Group	Identifies the user group responsible for updating the Task
Action	Displays a link to Edit or Delete the Task

2. To open the record associated with a Task, click the **Immunization Record ID** link in the Tasks list.

The Record will display in the CIRTS main window.

3. To view the full Task information, click the **Edit** link in the Tasks list.

The Edit Task dialog box will display

Edit Task

Task Information

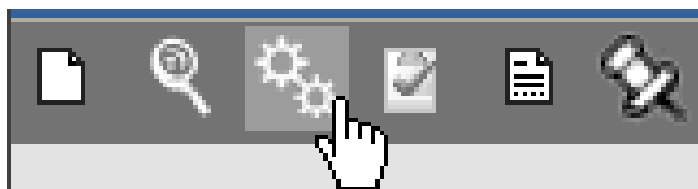|	
Immunization Record:	100084351 - Immunization Record - Tina Tyke Testkid
Type:	Assignment ▾
Status:	Pending ▾
Created By:	Sally Someone [sbsite]
Create Date:	02/11/2012
Last Update:	02/11/2012
Priority:	High ▾
Due Date:	02/24/2012
Start Date(mm/dd/yyyy):	
Complete Date:	
Description:	Possible duplicate record
Notes:	This child may already be in the system - please search and verify
Assign to user:	Sally Someone [sbsite] ▾ [Assign to me]
Assign to group:	

Save   Cancel

4. Click the **Save** button to save any changes to the task or the **Cancel** button to return to the CIRTS main window without saving any changes.

Tasks may also be viewed from the Workflow Queues

The Workflow Queues display tasks organized into four categories:

- My Open Tasks
- My Overdue Tasks
- Open tasks Created by Me
- Overdue Tasks Created by Me

1. Click the **Workflow** button on the CIRTS Dashboard toolbar.

The Workflow Queue window will display.

2. Click one of the task category **links** to display the Tasks list window for the selected category.

Tasks can now be viewed and edited in the same manner as when accessed using the Tasks button in the CIRTS main toolbar.

To create an immunization record-specific task:

1. Open an immunization record.

2. Click the **Tasks** button on CIRTS toolbar.

If a record is loaded, tasks for that current record (if any) and the current user will be displayed.

3. Click the **Add case task** button.

The Add Task screen will display.

Add Task

Task Information

Immunization Record:	100084354 - Immunization Record - Chloe Child
Type:	
Status:	Pending
Priority:	Very Low
Due Date:	
Start Date(mm/dd/yyyy):	
Complete Date:	
Description:	
Notes:	
Assign to user:	[Assign to me]
Assign to group:	

Save   Cancel

4. Select the task **Type** (Assignment) from the list.

5. Select the task **Status** from the list: Pending, In Progress, Completed.

6. Select the task **Priority** from the list: Very Low, Low, Medium, High, Very High

7. Enter a task **Due Date**.

8. Enter a task **Description**.

9. Enter task **Notes**.

10. Select the **User** or **Group** to whom the task should be assigned

11. Click the **Save** button.

   If required information is omitted, an error message will display and the task will not be assigned until the information is provided.

Add Task

Please correct the indicated errors before proceeding:
No user or group assignment selected for the task

When all required information is provided, the task will be saved and the system will return to the CIRTS main window.

All record-specific tasks will be displayed in the Tasks tab of the Patient Information section.

Patient Information

| Immunizations Data | Concerns | Client Info | Tasks | Case History |

Tasks

TYPE	STATUS	PRIORITY	DUE DATE	DESCRIPTION	ASSIGNED TO	ASSIGNED TO GROUP
Assignment	Pending	Very High	02/29/2012	Correct PCV Date	Sally Someone [sbsite]	

[Add Task]   [Update Task]

Details

Type:	Assignment
Status:	Pending
Priority:	Very High
Description:	Correct PCV Date
Assigned To:	Sally Someone
Assigned To Group:	
Create Date:	02/19/2012
Created By:	Sally Someone
Last Update:	02/19/2012
Updated By:	Sally Someone
Due Date:	02/29/2012
Start Date(mm/dd/yyyy):	
Complete Date:	
Notes:	Please check/correct the date of the PCV vaccine given date

CREATE A NON-RECORD-SPECIFIC TASK

It is also possible to create a task that does not relate to a specific record.

To create a non-record-specific task:

1. Click the **Tasks** button on CIRTS toolbar.

    An immunization record does not have to be open.
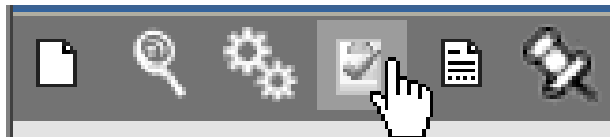
If a record is loaded, tasks for that current record (if any) and the current user will be displayed.

Tasks

Tasks for the selected case

Type	Priority	Due Date	Description	Status	Created By	Immunization Record	Assigned To	Assigned To Group	Action
Assignment	Very High	02/29/2012	Correct PCV Date	Pending	Sally Someone (02/19/2012)	100084354 - Immunization Record - Chloe Child	Sally Someone [Start Task]		Edit Delete

My tasks (specifically assigned to me)

Type	Priority	Due Date	Description	Status	Created By	Immunization Record	Assigned To	Assigned To Group	Action
Assignment	Very High	02/10/2012	An Important task	Pending	Sally Someone (02/05/2012)	100084349 - Immunization Record - Ted Test	Sally Someone [Start Task]		Edit Delete
Assignment	Very High	02/29/2012	Correct PCV Date	Pending	Sally Someone (02/19/2012)	100084354 - Immunization Record - Chloe Child	Sally Someone [Start Task]		Edit Delete
Assignment	High		02/10/2012	Another Important Task	Pending	Sally Someone (02/05/2012)	100084347 - Immunization Record - Joe Blivitz	Sally Someone [Start Task]		Edit Delete
Assignment	High		02/17/2012	Facility Address	Pending	Suzy Admin (02/11/2012)	100084352 - Facility - New Tester Pediatrics	Sally Someone [Start Task]		Edit Delete
Assignment	High	02/24/2012	Possible duplicate record	Pending	Sally Someone (02/11/2012)	100084351 - Immunization Record - Tina Tyke Testkid	Sally Someone [Start Task]		Edit Delete

[Add case task]   [Add Task]   [Home]

2. Click the **Add Task** button.

    The Add Task dialog box for a non-record-specific task will display.

Add Task

Task Information	
Immunization Record:	Not specific to a case
Type:	
Status:	Pending
Priority:	Very Low
Due Date:	
Start Date(mm/dd/yyyy):	
Complete Date:	
Description:	
Notes:	
Assign to user:	[Assign to me]
Assign to group:	

Save   Cancel

3. Select the task **Type** (Assignment) from the list.

4. Select the task **Status** from the list: Pending, In Progress, Completed.

5. Select the task **Priority** from the list: Very Low, Low, Medium, High, Very High

6. Enter a task **Due Date**.

7. Enter a task **Description**.

8. Enter task **Notes**.

9. Select the **User** or **Group** to whom the task should be assigned

10. Click the **Save** button.

If required information is omitted, an error message will display and the task will not be assigned until the information is provided.

Add Task

Please correct the indicated errors before proceeding:
No user or group assignment selected for the task

When all required information is provided, the task will be saved and the system will return to the CIRTS main window.

Tasks that are not record-specific will not be displayed in the Tasks tab of the Patient Information section. These tasks will display in the Tasks section of the Splash screen.

Connecticut Immunization Registry and Tracking System

[   ] [Open] [Logout]

Logged in as sbsite

Workflows

No workflows to display

More ...

Tasks

Assignment	Very High	Test, Ted	Immunization Record
Assignment	Very High	Child, Chloe	Immunization Record
Assignment	High	Blivitz, Joe	Immunization Record
Assignment	High	New Tester Pediatrics	Facility
Assignment	High	Testkid, Tina Tyke	Immunization Record

More ...

Welcome To Connecticut Immunization Registry and Tracking System

Welcome to CIRTS - the Connecticut Immunization Registry and Tracking System

CIRTS (Connecticut Immunization Registry and Tracking System), is a free, statewide, computerized program established and maintained at the Connecticut Department of Public Health for the purpose of assuring timely childhood immunizations. CIRTS currently contains the records of over 525,000 children. Each year, an additional 35,000 children, primarily newborns, are added.

CIRTS can:

- provide a reliable immunization history for any child, whether a new or continuing patient;
- consolidate immunizations from all providers into one record;
- provide definitive information on immunizations due or overdue;
- provider reminders and recalls for immunizations due or overdue;
- generate official immunization records needed for school and day care entry;
- generate immunization coverage reports;
- provide current recommendations and information on new vaccines;
- facilitate introduction of new vaccines or changes in the immunization schedule.
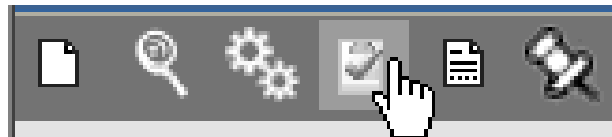
Alerts

DELETE A TASK

Tasks can be deleted from immunization records.

To delete a task:

1. Click the **Tasks** button on CIRTS toolbar.

   An immunization record does not have to be open.

   The Tasks screen will display.

2. Click the **Delete** link for the task that will be deleted.

   A Message box asking you to verify the deletion will display.
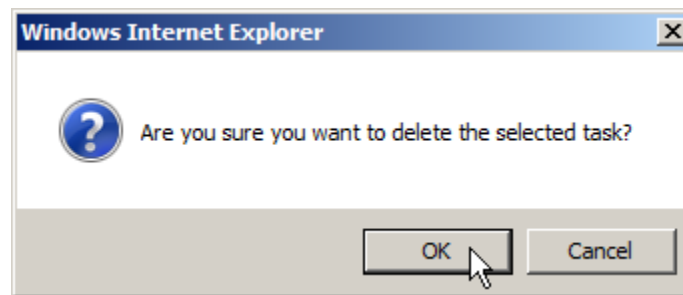
3. Click the **OK** button to delete the task or the **Cancel** button to keep the task.

   The task will be deleted and will no longer display in the Tasks screen, in the Splash screen, or in the Tasks tab in the Patient Information section.

Chapter 18: Reports

O V E R V I E W

Purpose

Describe the CIRTS reports feature

Objectives

- View and describe the CIRTS pre-defined reports

- Print CIRTS pre-defined reports

- Export CIRTS pre-defined reports

VIEWING REPORTS

Reports in CIRTS can be used to view and analyze immunization data. The reports can be displayed in two ways:
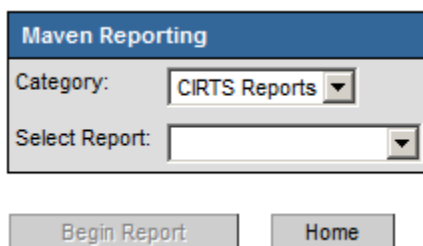
- In a non-editable format within the browser window

- Exported to Microsoft Excel. Exporting the data allows for the data to be manipulated, formatted, or even graphed.

To view a report:

1. Click the **Reports** button on CIRTS Dashboard toolbar.
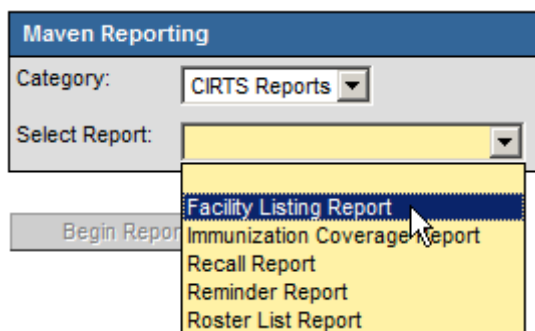
The Maven Reporting window will display.
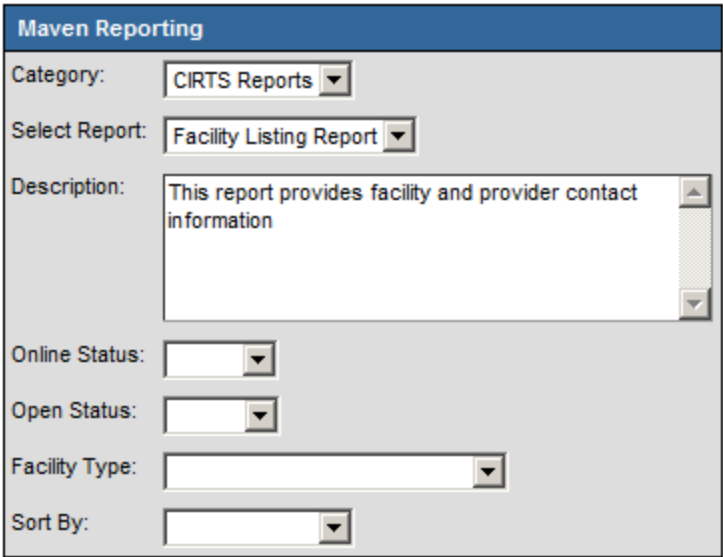
2. Select a report category from the **Category** list.

   Currently, the only available report Category for Provider Site users is "CIRTS Reports".

3. Select a report from the **Select Report** list.

Additional data fields will be displayed for the selected report. The fields will vary by report.

Currently, there are six pre-defined reports for CIRTS Provider site users:

- Roster List – a list of patients in a specified Date of Birth range
- Reminder Report – a list of patients due for immunizations by Date of Birth range
- Recall Report – a list of patients overdue for immunizations
- Immunization Coverage Report – a coverage rate report of patients by Date of Birth range that can be run by DPH Administrators only
- Immunization Certificate - an official certificate of the patient's immunization record
- Facility Listing - a list of all the pediatric and family practices, clinics, birthing hospitals, and health departments

Additional reports may be defined and created in the future.

Provider Sites will run the Roster List, Reminder Report, and Recall Report for their own facility. All users can run the Immunization Certificate and the Facility Listing

4. Enter the appropriate report criteria.

If you leave the Online Status, Open Status, and Facility Type blank, it will run the report for all of the sites.

5. Click the **Begin Report** button.

The report will display in a new window.

If there is no data for the report selections, the report will display with a "Total: 0" message.
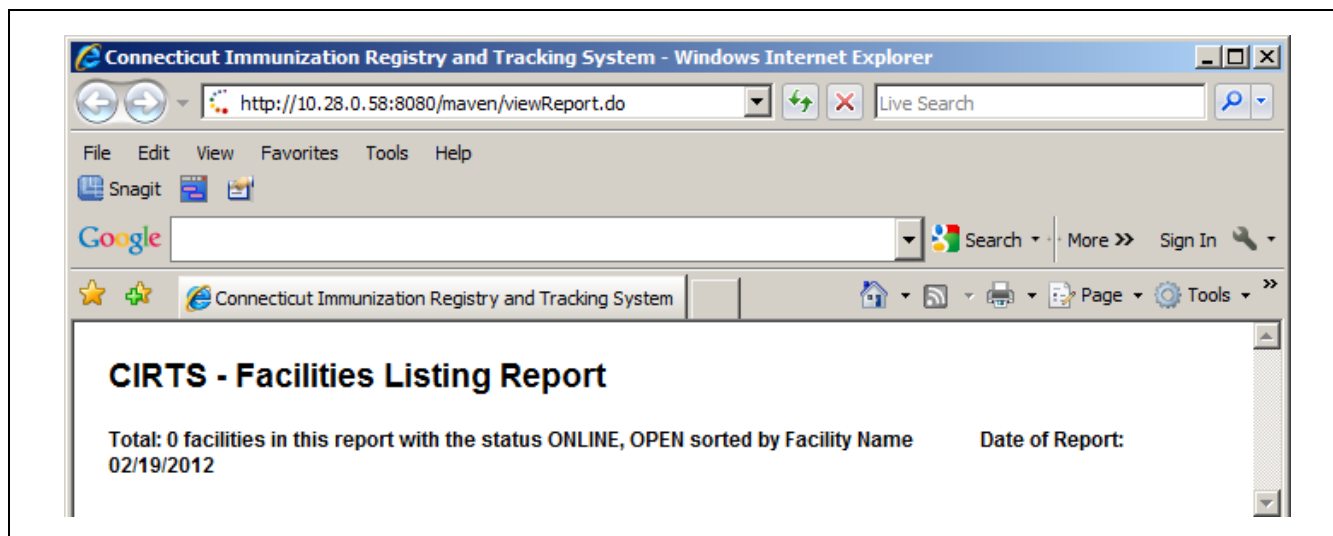
6. After viewing the report, click the report window **Close** button to close the report and return to the Maven Reporting window.
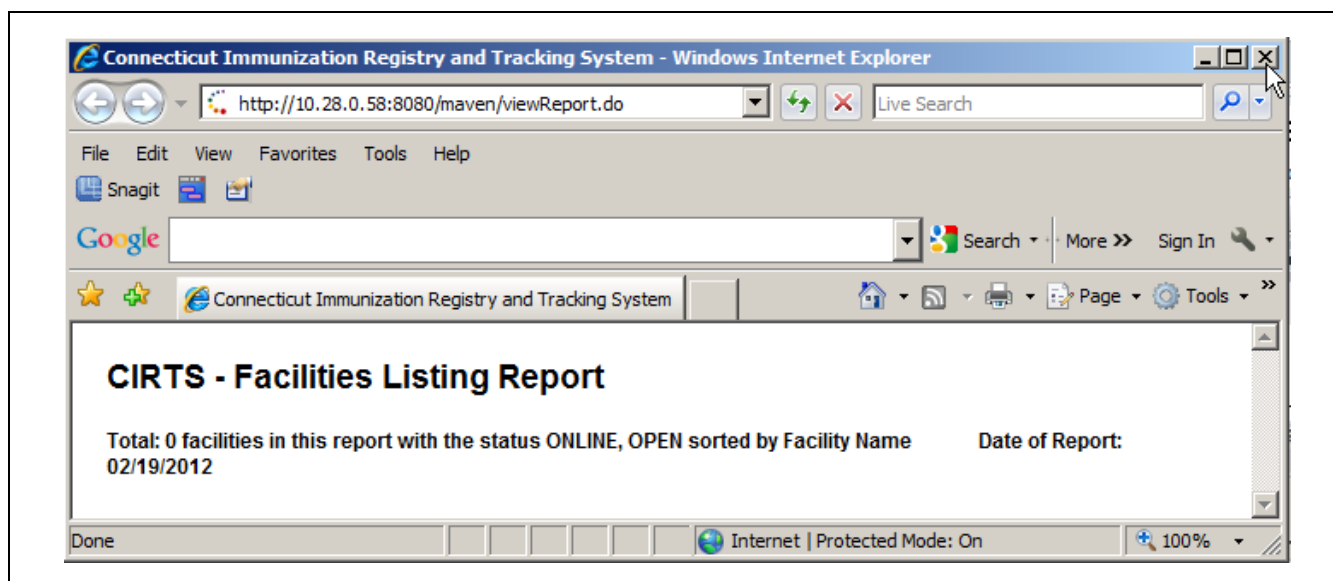
7. Click the **Home** button to return to the Maven Dashboard window.

Maven Reporting

Category: CIRTS Reports

Select Report: Facility Listing Report

Description: This report provides facility and provider contact information

Online Status: Online

Open Status: Open

Facility Type: Delivery Hospital

Sort By: Facility Name

Begin Report   Export Results   Home

EXPORTING REPORT DATA TO MICROSOFT EXCEL

CIRTS provides the capability to export selected report data to Microsoft Excel.

To export data to Excel:

1. Follow the steps to select report data.

2. Instead of clicking the Run Report button, click the **Export Results** button.
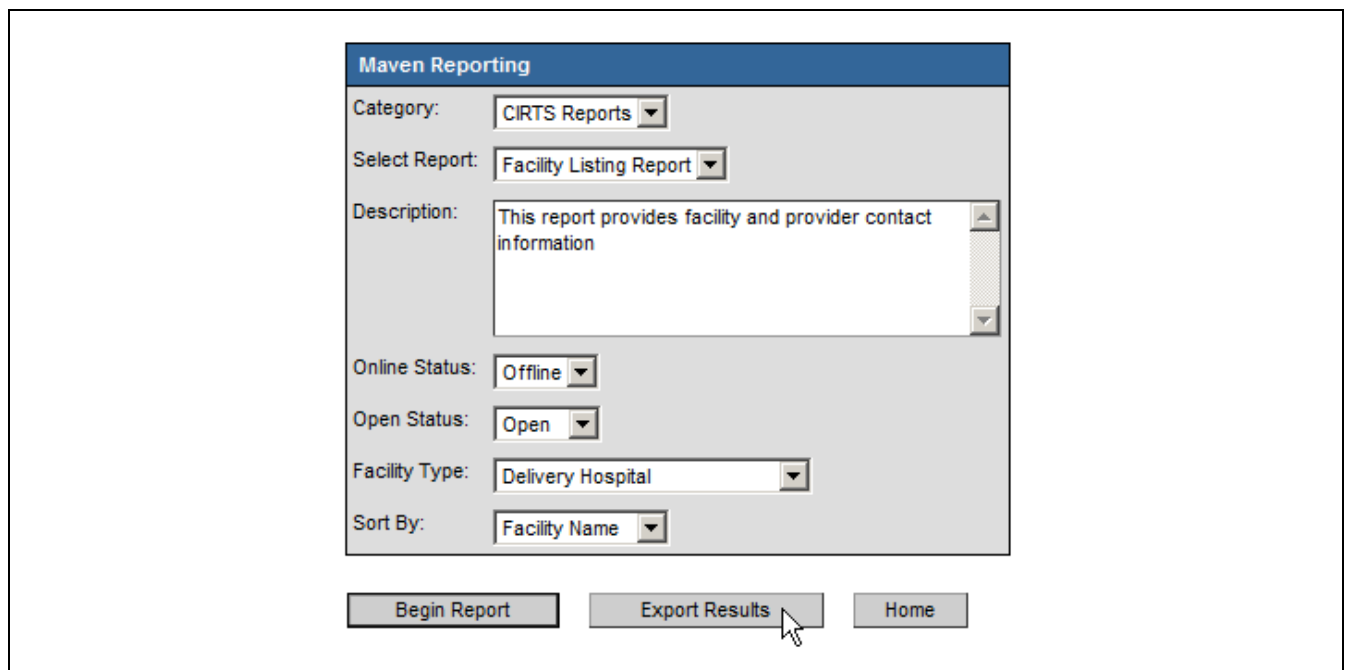
The File Download dialog box will display.
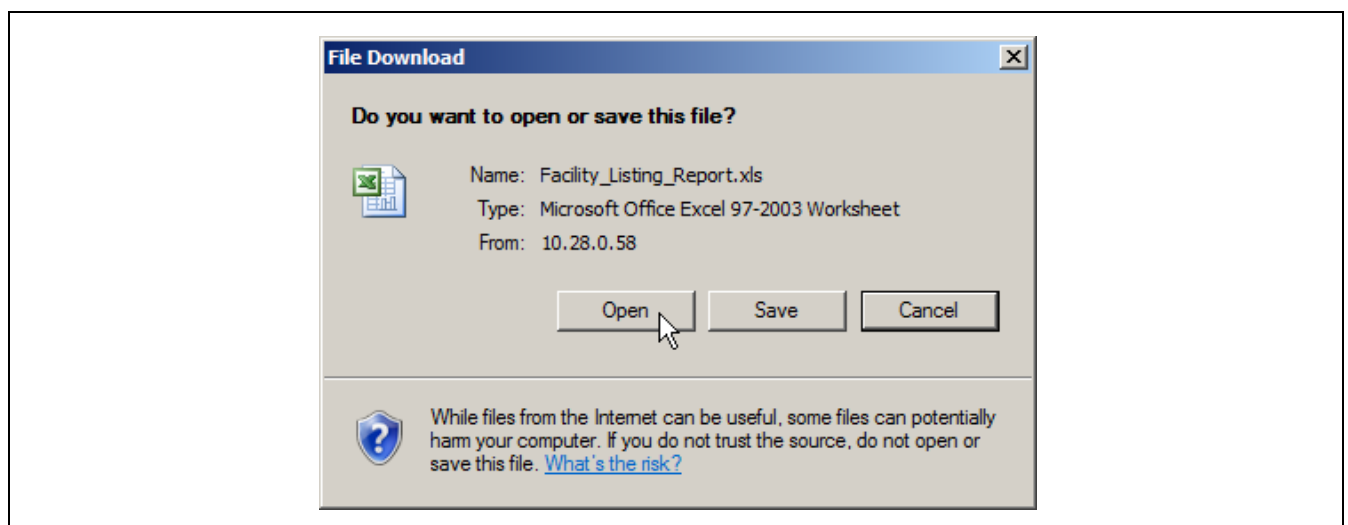
3. Click the **Open** button.

The Excel application will open automatically and a workbook file with the report data will be created.

The report data can now be manipulated just like any other Excel workbook. It is completely independent and does not have any connection to CIRTS or its data.

4. If the **Save** button is clicked instead of the Open button, the Save As dialog box will display.
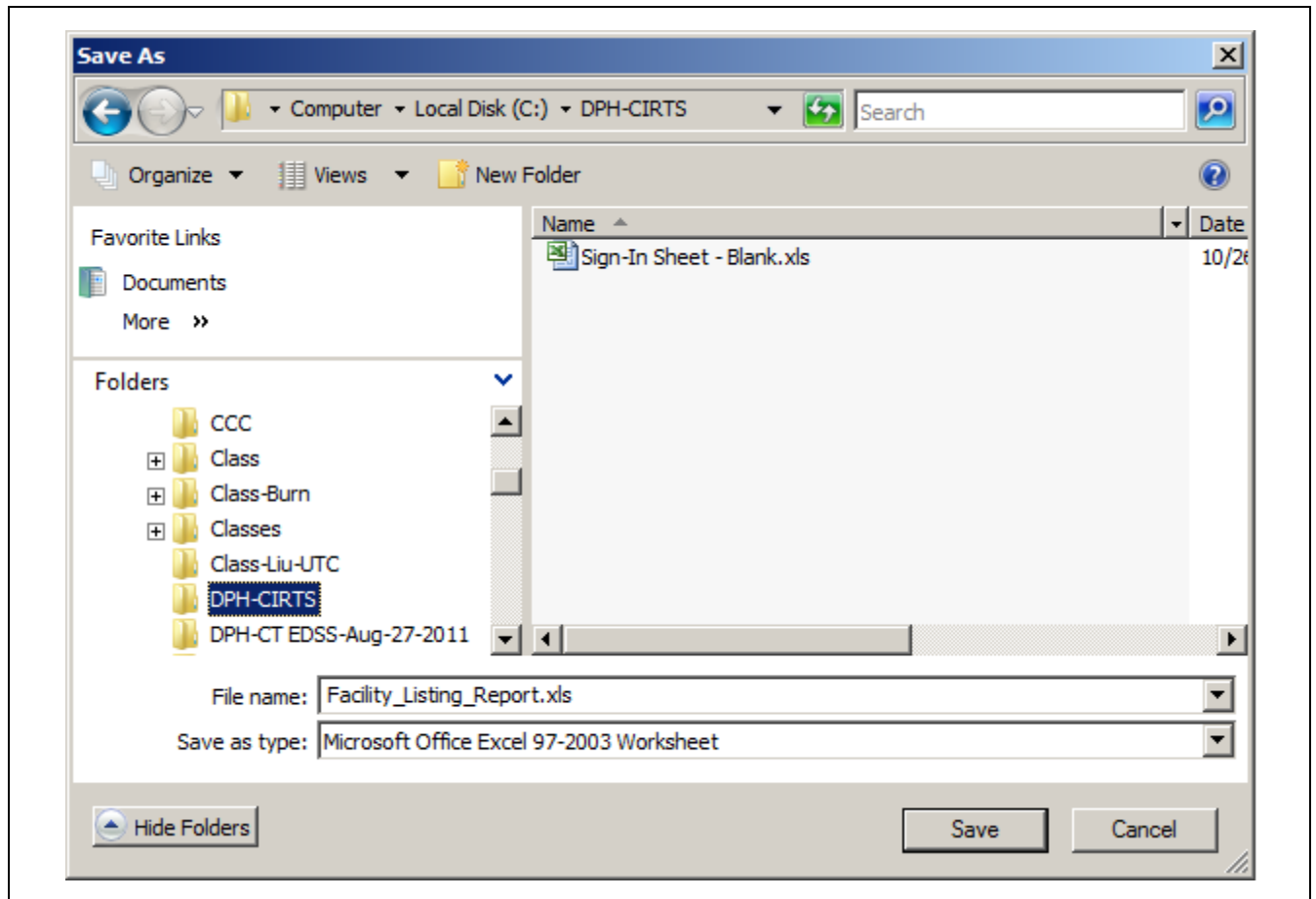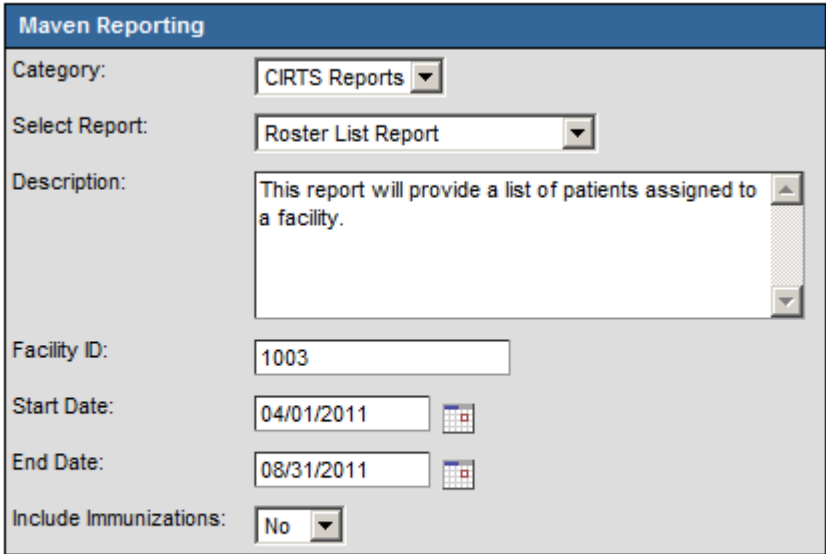
5. Enter the appropriate path and file name information and click the **Save** button to create an Excel workbook with the report data. With this option, Excel will not automatically open.

ROSTER LIST REPORT

The Roster List Report provides a list of patients for a specified Date of Birth range. The maximum date range between start date and end date is 183 (six months) days.

1. Follow the steps to view a report.

2. Select **Roster List Report** from the Select Report list.

3. Enter the appropriate report criteria.

4. Click the **Begin Report** button.

Maven Reporting

Category:	CIRTS Reports
Select Report:	Roster List Report
Description:	This report will provide a list of patients assigned to a facility.
Facility ID:	1003
Start Date:	04/01/2011
End Date:	08/31/2011
Include Immunizations:	No

Begin Report   Export Results   Home

If the date range exceeds 183 days, an error message will display.

Roster List Report

Error: The maximum date range between start date and end date is 183 days.

The report will display in a new window.

Roster List Report

Total: 21 patients in this report born in between 04/01/2011 and 08/31/2011 with the facility MAGIC CARPET PEDI (ID: 1003)

Birth Date	Last Name	First Name	Care Giver	Address	Phone
07/01/2011	Wurm	Cashien	Wurm, Debbye	16 Windbrook Ln, HARTFORD, CT 06106	(860) 978-6976
07/04/2011	Bolduc	Gabriella	Soprano, Heather	100 Apple Rd., HARTFORD, CT 06106	
07/07/2011	Baryshnikov	Raymond	Baryshnikov, Yekaterina	123 Puzzle Pkwy, HARTFORD, CT 06106	(860) 358-1321
07/07/2011	Nguyen	Lori	Nguyen, Linda	32 Lolipop Lane, HARTFORD, CT 06106	(860) 867-5309
07/12/2011	Ramos	David	Ramos, Zuleika	8 Park Rd, HARTFORD, CT 06106	(860) 676-3047
07/15/2011	Lee	Sun Sun	Lee, Chung Ja	32 Frost St, HARTFORD, CT 06106	(860) 205-8369
07/15/2011	Sacco	Rachel	Sacco, Nina	68 Miller Drive, HARTFORD, CT 06106	(860) 476-3478
07/21/2011	Soprano	Marco	Marticello, Catalina	50 Sunflower Lane, HARTFORD, CT 06106	(860) 718-1920
07/23/2011	Patel	Abhilasha	Patel, Hima	23 Main Street, HARTFORD, CT 06106	(860) 258-1470

If "**Yes**" is selected from the **Include Immunizations** list, the Roster List Report will display the Vaccine Name and Vaccine Date for each selected patient.

Maven Reporting

Category: CIRTS Reports

Select Report: Roster List Report

Description: This report will provide a list of patients assigned to a facility.

Facility ID: 1003

Start Date: 04/01/2011

End Date: 08/31/2011

Include Immunizations: No
No
Yes

Begin Report　　　Export Results　　　Home

Roster List Report
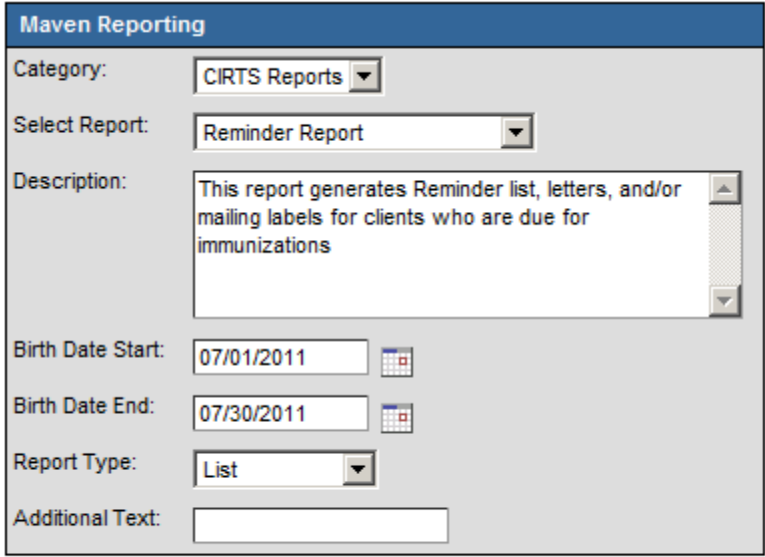
Total: 21 patients in this report born in between 04/01/2011 and 08/31/2011 with the facility MAGIC CARPET PEDI (ID: 1003)

Birth Date	Last Name	First Name	Care Giver	Address	Phone	Vaccine Name	Vaccine Date
07/01/2011	Wurm	Cashien	Wurm, Debbye	16 Windbrook Ln, HARTFORD, CT 06106	(860) 978-6976	DTaP-Hib-IPV	12/08/2011
						PCV13	02/13/2012
						HepB-Peds	07/01/2011
						HepB-Peds	02/13/2012
07/04/2011	Bolduc	Gabriella	Soprano, Heather	100 Apple Rd., HARTFORD, CT 06106		DTaP-Hib-IPV	08/29/2011
						DTaP-Hib-IPV	10/24/2011
						DTaP-Hib-IPV	01/18/2012

REMINDER REPORT

The Reminder Report provides a report of patients within a Date of Birth range that are due for immunizations. The maximum date range between start date and end date is 30 days. The report can display a list of patients, reminder letters for the selected patients, or mailing labels for the selected patients.

1. Follow the steps to view a report.

2. Select **Reminder Report** from the Select Report list.

3. Enter the appropriate report criteria.

4. Select **List**, **Letters**, or **Mailing Labels** from the **Report Type** list.

5. Click the **Begin Report** button.

Maven Reporting

Category: CIRTS Reports

Select Report: Reminder Report

Description: This report generates Reminder list, letters, and/or mailing labels for clients who are due for immunizations

Birth Date Start: 07/01/2011

Birth Date End: 07/30/2011

Report Type: List

Additional Text:

Begin Report   Home

If the date range exceeds 30 days, an error message will display.

Reminder Report

Error: The maximum date range between start date and end date is 31 days.

The report will display in a new window.

Reminder Report

Total: 11 patients in this report born between 07/01/2011 and 07/31/2011 in sbsite's facilities with due vaccines.

1003: MAGIC CARPET PEDI

Name	Birth Date	Address	Phone	Care Giver
Wurm, Cashien	07/01/2011	16 Windbrook Ln, HARTFORD, CT 06106	(860) 978-6976	Wurm, Debbye
Bolduc, Gabriella	07/04/2011	100 Apple Rd., HARTFORD, CT 06106		Soprano, Heather
Baryshnikov, Raymond	07/07/2011	123 Puzzle Pkwy, HARTFORD, CT 06106	(860) 358-1321	Baryshnikov, Yekaterina
Nguyen, Lori	07/07/2011	32 Lolipop Lane, HARTFORD, CT 06106	(860) 867-5309	Nguyen, Linda
Ramos, David	07/12/2011	8 Park Rd, HARTFORD, CT 06106	(860) 676-3047	Ramos, Zuleika
Lee, Sun Sun	07/15/2011	32 Frost St, HARTFORD, CT 06106	(860) 205-8369	Lee, Chung Ja
Sacco, Rachel	07/15/2011	68 Miller Drive, HARTFORD, CT 06106	(860) 476-3478	Sacco, Nina
Soprano, Marco	07/21/2011	50 Sunflower Lane, HARTFORD, CT 06106	(860) 718-1920	Marticello, Catalina
Patel, Abhilasha	07/23/2011	23 Main Street, HARTFORD, CT 06106	(860) 258-1470	Patel, Hima
Caruk, Katinka	07/24/2011	444 Sunflower Lane, HARTFORD, CT 06106	(860) 728-4444	Caruk, Nancita
Martinov, Sergey	07/24/2011	35 Treetop Hill, HARTFORD, CT 06106	(860) 307-4506	Martinov, Svetlana

If "**Letters**" is selected from the **Report Type** list, the Reminder Report will display reminder letters for each selected patient.

Dear Parent or Caregiver of Sun Sun Lee,

Our records show that Sun Sun Lee needs one or more shot(s). If Sun Sun received shots from another office, please call our office. We can update Sun Sun's record. Otherwise, please call for an appointment.

Estimados padres y/o tutores de Sun Sun Lee,

Nuestro registro indica que Sun Sun Lee necesita una o más vacunas. Si Sun Sun recibió vacunas en otra oficina, por favor llame a nuestra oficina. Podemos poner al día el expediente de Sun Sun. Si no, por favor llame para hacer una cita.

MAGIC CARPET PEDI

(555) 555-5555

If "**Mailing Labels**" is selected from the **Report Type** list, the Reminder Report will display mailing labels for each selected patient.

Sun Sun Lee
32 Frost St
HARTFORD, CT 06106

Rachel Noelle Sacco
68 Miller Drive
HARTFORD, CT 06106

Katinka Maria Caruk
444 Sunflower Lane
HARTFORD, CT 06106

Cashien Danilo Wurm
16 Windbrook Ln
HARTFORD, CT 06106

David Adarius Ramos
8 Park Rd
HARTFORD, CT 06106

Raymond Baryshnikov
123 Puzzle Pkwy
HARTFORD, CT 06106

RECALL REPORT

The Recall Report provides a report of patients within a Date of Birth range that are overdue for immunizations. The maximum date range between start date and end date is 30 days. The report can display a list of patients, reminder letters for the selected patients, or mailing labels for the selected patients.

1. Follow the steps to view a report.

2. Select **Recall Report** from the Select Report list.

3. Enter the appropriate report criteria.

4. Select **List**, **Letters**, or **Mailing Labels** from the **Report Type** list.

5. Click the **Begin Report** button.

If the date range exceeds 30 days, an error message will display.

The report will display in a new window.

Recall Report

Total: 11 patients in this report born between 07/01/2011 and 07/31/2011 in sbsite's facilities with due vaccines.

1003: MAGIC CARPET PEDI

Name	Birth Date	Address	Phone	Care Giver
Wurm, Cashien	07/01/2011	16 Windbrook Ln, HARTFORD, CT 06106	(860) 978-6976	Wurm, Debbye
Bolduc, Gabriella	07/04/2011	100 Apple Rd., HARTFORD, CT 06106		Soprano, Heather
Baryshnikov, Raymond	07/07/2011	123 Puzzle Pkwy, HARTFORD, CT 06106	(860) 358-1321	Baryshnikov, Yekaterina
Nguyen, Lori	07/07/2011	32 Lolipop Lane, HARTFORD, CT 06106	(860) 867-5309	Nguyen, Linda
Ramos, David	07/12/2011	8 Park Rd, HARTFORD, CT 06106	(860) 676-3047	Ramos, Zuleika
Lee, Sun Sun	07/15/2011	32 Frost St, HARTFORD, CT 06106	(860) 205-8369	Lee, Chung Ja
Sacco, Rachel	07/15/2011	68 Miller Drive, HARTFORD, CT 06106	(860) 476-3478	Sacco, Nina
Soprano, Marco	07/21/2011	50 Sunflower Lane, HARTFORD, CT 06106	(860) 718-1920	Marticello, Catalina
Patel, Abhilasha	07/23/2011	23 Main Street, HARTFORD, CT 06106	(860) 258-1470	Patel, Hima
Caruk, Katinka	07/24/2011	444 Sunflower Lane, HARTFORD, CT 06106	(860) 728-4444	Caruk, Nancita
Martinov, Sergey	07/24/2011	35 Treetop Hill, HARTFORD, CT 06106	(860) 307-4506	Martinov, Svetlana

If "**Letters**" is selected from the **Report Type** list, the Recall Report will display reminder letters for each selected patient.

Dear Parent or Caregiver of Sun Sun Lee,¶

Our records show that Sun Sun Lee needs one or more shot(s). If Sun Sun received shots from another office, please call our office. We can update Sun Sun's record. Otherwise, please call for an appointment.¶

¶

Estimados padres y/o tutores de Sun Sun Lee,¶

Nuestro registro indica que Sun Sun Lee necesita una o más vacunas. Si Sun Sun recibió vacunas en otra oficina, por favor llame a nuestra oficina. Podemos poner al día el expediente de Sun Sun. Si no, por favor llame para hacer una cita.¶

¶

MAGIC CARPET PEDI¶

(555) 555-5555¶

If "**Mailing Labels**" is selected from the **Report Type** list, the Recall Report will display mailing labels for each selected patient.

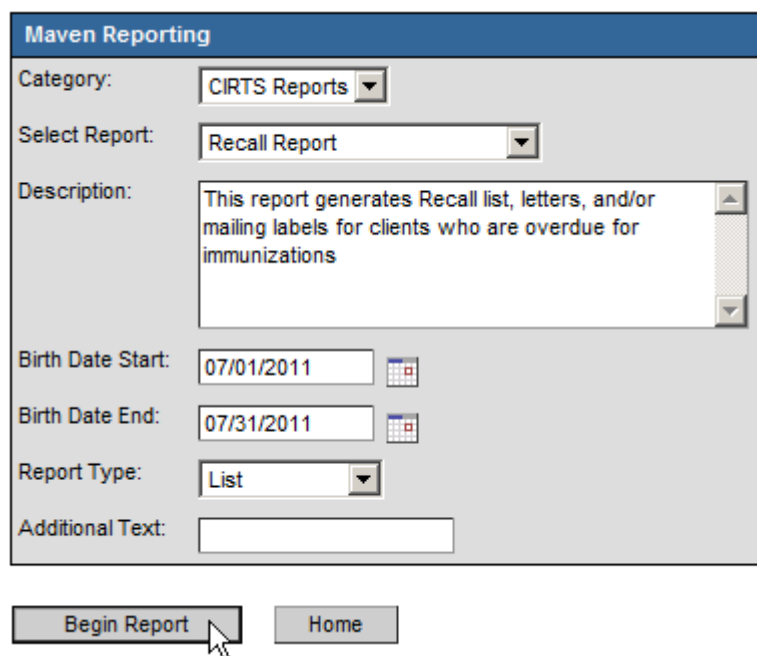|		
Sun Sun Lee 32 Frost St HARTFORD, CT 06106	Rachel Noelle Sacco 68 Miller Drive HARTFORD, CT 06106	Katinka Maria Caruk 444 Sunflower Lane HARTFORD, CT 06106
Cashien Danilo Wurm 16 Windbrook Ln HARTFORD, CT 06106	David Adarius Ramos 8 Park Rd HARTFORD, CT 06106	Raymond Baryshnikov 123 Puzzle Pkwy HARTFORD, CT 06106

Contact Information

Overview

For technical support and related questions, contact the following support staff:

Contacts	Phone/Fax	E-mail
DPH Help Desk (technical support for CIRTS)	Phone: (860) 509-7777	
State of Connecticut Department of Public Health, Immunization Program	Phone: (860) 509-7929 Fax: (860) 509-8370	
Nancy Sharova (CIRTS Program Supervisor)	Phone: (860) 509-7912	Nancy.Sharova@ct.gov

Appendix A: Glossary

Overview

Some of the commonly-used terms and abbreviations in CIRTS are:

Term	Meaning
CDC	Centers for Disease Control and Prevention
CIRTS	Connecticut Immunization Registry and Tracking System
DPH	Department of Public Health, State of Connecticut
NVAC	National Vaccine Advisory Committee (NVAC) functional standards
Permission	Pre-defined rules in CIRTS that allow a user the ability to perform certain actions, such as "create an record", "run a report" or "create a new user"
PHIN	Public Health Information Network (PHIN) published standards
Question Package	An organized set of information (questions) about a record
Role	A group of permissions (Ex: Provider Site Role)
Task	A mechanism for users to delegate assignments or work to others; may be related to a specific record or may be record-independent
User	A person who uses CIRTS
VFC	Vaccines for Children Program
Workflow	An internally-monitored mechanism within CIRTS to identify records and tasks that require user attention